Nortel Networks Symposium Agent

Installation Guide

Release 2.3 Standard 2.0 January 2001

NORTEL NETWORKS™

Nortel Networks Symposium Agent
Installation Guide

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Chapter 1

Getting started

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About this guide

Introduction

The *Symposium Agent Release 2.3 Installation Guide* provides instructions on how to install and configure Release 2.3 of the Symposium Agent software. Consult the Readme.txt file located on the root directory of the CD-ROM for the latest updates and important installation notes.

Administration instructions

The full administration guide for Symposium Agent is in HTML format. Links to the online Help document appear on the browser-based Symposium Agent Administration Tool.

Distribution of this guide

This document is available only in electronic Portable Document Format (PDF) on the CD-ROM that is supplied with the Symposium Agent Release 2.3 software.

View this file using Acrobat Reader, or print it in whole or in part for individual use.

Who should read this guide

This guide is for system administrators and technical support personnel who are responsible for installing, configuring, and administering Symposium Agent.

Skills you need

To use this guide effectively, you must be familiar with telephony products, databases, the Internet, Windows NT, Windows 2000, Windows 98, and Windows 95. You should be familiar with the installation of TAPI Service Provider and the Remote TAPI Service Provider (client) software. You should also have a working knowledge of database installation and administration.

Only qualified information systems personnel should maintain and upgrade this product.

Overview of Symposium Agent Release 2.3

Introduction

Symposium Agent Release 2.3 is a powerful agent productivity tool that enables call center agents to provide intelligent and personalized customer care.

Release 2.3 provides a call center agent or knowledge worker with the framework for integrating all of the computer and telephony tasks into a single, cohesive interface.

Symposium Agent Release 2.3 features

Symposium Agent Release 2.3 includes the following features:

- all of the Release 2.0 functionality
- an enhanced user interface
  - a unified interface to all of the Symposium Agent Release 2.3 functions
  - intranet/Internet services
  - web applications
  - enhanced agentCompass functionality
  - enhanced telephony control
- LAN installation and automatic software updates
- support for “roaming” users
- browser-based administration
- Light-weight Directory Access Protocol (LDAP) support
- central data storage
- multiple-language support

System requirements

Server hardware

Symposium Agent requires the following server hardware:

- Pentium II PC 400 MHz or higher
- minimum 6.0 Gbyte hard disk drive (4.56BG free space)
- minimum of 256 Mbytes of RAM
- CD-ROM drive
- Ethernet connection

Server software

Windows 2000 Server

Symposium Agent requires you install the following server software:

- Sybase Adaptive Server 12.0

Windows NT 4.0 Server

Symposium Agent requires you install the following server software:

- Windows NT Server 4.0 and Service Pack 6.0 or higher

  You can verify the service pack level during the early stages of the startup. The service pack version appears next to the Windows NT build number.
- Internet Explorer 4.0 with Service Pack 1 or higher

  You can verify the version in Internet Explorer by choosing Help › About in Internet Explorer.
- Windows NT Option Pack 4.0 (Internet Information Server and Transaction Server)

To determine if Internet Information Server has been installed, look for IIS Admin Service. To determine if Microsoft Transaction Server has been installed, choose Settings › Control Panel › Add/Remove Programs from the Start menu. Look for the Windows NT 4.0 Option Pack. If the Option Pack is installed then Microsoft Transaction Server is also installed.

- Microsoft Data Access Components 2.1 or higher

  You can determine the version number by downloading the Component Checker Tool from the Microsoft web page. Find the Component Checker Tool download. This will extract a cc.exe to a specified directory on your PC. The cc.exe will extract the comcheck directory including the comcheck.exe. Read the included README.TXT file for more information.
- TAPI Server or Remote TAPI Service Provider (if running on separate servers)
- Sybase Adaptive Server 12.0

Client (agent workstation) hardware

Symposium Agent requires the following client hardware:

- Pentium PC 200 MHz or higher
- minimum 25 Mbytes free hard disk space
- minimum of 32 Mbytes of RAM
- Ethernet connection

Client (agent workstation) software

Symposium Agent requires the following client software:

- Windows 95, Windows 98, or Windows NT Workstation 4.0 with Service Pack 4.0 or higher, Windows 2000 Professional

Note: If you are using Windows 2000 Professional. You do not need to install Internet Explorer or Microsoft Data Access Components 2.1.

- Internet Explorer 4.01 or 5.0

- Microsoft Data Access Components 2.1 or higher (The version of MDAC HKEY_LOCAL_MACHINES\SOFTWARE\Microsoft\DataAccess" registry key.)
- Remote TAPI Service Provider

Installation considerations

Coresident with TAPI

Can I change my computer name?

No. On a coresident TAPI (2.1.0.9) and Symposium Agent it is recommended that you not change your computer name, because certain server components will no longer function properly.

Can I prevent Sybase installation problems?

Yes, by stopping Sybase SQLServer service.

1 Perform on of the following tasks

IF	THEN
you are using Windows NT	from the Windows Start menu, choose Settings → Control Panel → Services.
you are using Windows 2000	from the Windows Start menu choose Settings → Control Panel → Administrative Tools → Services.

2 Stop the Sybase SQLServer service.

Note: If a problem occurs during the Sybase installation, then stop the Telephony service to allow more memory for the Sybase installation process.

Coresident with Symposium WebResponse Server 2.0

Symposium Agent 2.3 and Symposium WebResponse Server 2.0 cannot co-exist because they require different versions of Sybase Adaptive Server.

Internet Explorer 5.0

Are there any special installation options required for IE 5.0?

When installing Internet Explorer 5.0:

1 Select Minimal Installation (customize installation).

2 Select the following additional components: Dynamic HTML Binding and Advanced (Compatibility).

TAPI on client PCs

Windows 95 users

If you are using Windows 95, you need to install TAPI 2.1 (tapi2195.exe) on your client.

Windows 98 and Windows 2000 users

If you are using Windows 98, TAPI 2.1 is already installed on the client.

Windows NT client running Service Pack 4

TAPI 2.1 is already installed on the client.

TAPI on a Windows NT server

TAPI must be installed within the domain of a trusted Windows NT server.

Microsoft Data Access Components (MDAC) 2.1 (server side)

You do not need to install MDAC 2.1 if you are using Windows 2000 Server. Windows 2000 Professional and Windows 2000 Server already have MDAC 2.5 installed. The installation choices differ from those of MDAC 2.0:

1 Accept the license agreement.

The files will be copied.

2 Choose the Continue button.

3 Select the Complete installation button.

4 Press OK after install completes successfully.

Microsoft Data Access Components (MDAC) 2.1 (client side)

You do not need to install MDAC 2.1 if you are using Windows 2000 Professional. The installation choices differ from those of MDAC 2.0:

1 Accept the license agreement

The files will be copied.

2 Choose the Continue button.

3 Select the Complete installation button.

4 After the install completes, you may be asked to reboot your computer.

New Symposium Agent Installation

For a new installation, ensure you have at least 2 GB of free space on the drive used to create the Sybase files required for Symposium Agent

You must be logged into the domain as Administrator and be a member of the local administration for Windows 2000 Server.

Database Administration

- Configure Server Variables must be checked.

  The logged output is placed in the text file c:\Nortel\Server\NNDBCfg\ConfgSrv.out

  Check for the successful creation of the TempDB Device as well as the Master dump device.
- Create Database must be checked

  Check the text file c:\Nortel\Server\NNDBCfg\CreateDatabase.out for errors that may have occurred during Database creation.
- Create Tables must be checked

  Check the file c:\Nortel\Server\NNDBCfg\sar2schema.out for errors that may have occurred during table creation.
- Create Stored Procedures must be checked

  Check the file c:\Nortel\Server\NNDBCfg\StoredProcs.out for errors that may have occurred during the creation of stored procedures.
- ODBC System DSN must be checked.

  This registers the Symposium Agent ODBC.
- Update Database must NOT be checked.

MTS Package Administration

Use Administrator as the user. The format of this field is

```
<DOMAINNAME>\<user>
```

For example, a domain of TESTLAB would be

```
TESTLAB\Administrator
```

Symposium Agent Server Upgrade

Please refer to the latest README.txt file for any special requirements for a particular release.

Database Administration

- Create Stored Procedures must be checked

  The output is logged in c:\Nortel\Server\NNDBCfg\StoredProcs.out. Check this log file for errors.

- Update Database

  If any database schema has changed from a previous release you will be instructed via the README.txt file to choose this option.

MTS Package Administration

Use Administrator as the user. The format of this field is

```
<DOMAINNAME>\<user>
```

For example, a domain of TESTLAB would be

```
TESTLAB\Administrator
```

Windows 2000 and MTS

In Windows 2000, the Microsoft Transaction Server for Windows NT has been replaced by COM+. Throughout this document, when you see reference to MTS on Windows NT, the same functional properties are accessed as COM+ on Windows 2000.

Windows 2000 and Sybase 12.0

The Sybase installation of version 12.0 does not create links to the programs correctly on Windows 2000. All of the Sybase shortcuts found under the folder

C:\WINNT\Profiles\AllUsers\StartMenu\Programs\Sybase

should be moved to

C:\Documents and Settings\AllUsers\StartMenu\Programs\Sybase

This is the location where Windows 2000 stores shortcuts.

Telephony options

Meridian 1 requirements

- X11 Release 23 or higher
- Symposium TAPI Service Provider for Meridian 1, Release 2.1 or higher
- phonesets of one or more of the following types: M2008, M2216, M2616; or MDT3110, MDT10, MDT3820, M3905
- Meridian Link 5 or higher (optional)
- Symposium Call Center Server 1.0 or higher (optional)

DMS Centrex and MSL-100 requirements

- DMS Centrex or MSL-100 with ICM for NA006
- Symposium ICM TAPI Driver for DMS/MSL-100
- phonesets of one or more of the following types: M5000 series, POTS (single line), or (if you are using MSL08 with the IVD patch, RIC88, or a subsequent version of the MSL software) M2008, M2216, or M2616

Chapter 2

Installing the server software

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Server pre-installation

Overview

Before you install the database or Symposium Agent Release 2.3, you must have a functioning Windows 2000 Server, or Windows NT 4.0 Server 4.0 operating system. For more information, see "System requirements," on page 11.

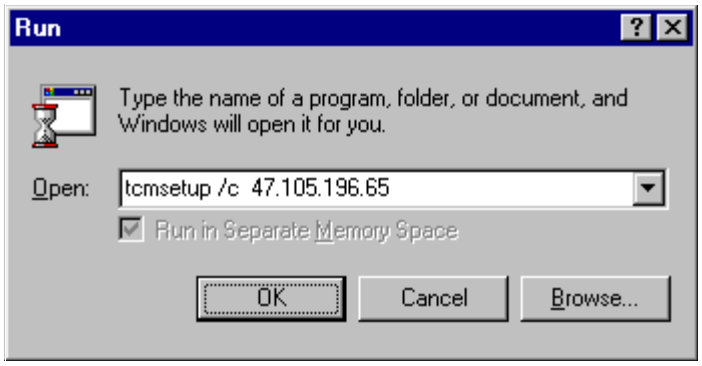
Locate the software on the Microsoft Web site. Instructions for installing each of these components are provided by Microsoft, and are not supplied here.

Order of installation

Install the prerequisite software in the following order:

Note: If you are using Windows 2000 Server skip to step six.

1. Install Windows NT Server 4.0.
2. Install Internet Explorer 4.0 with Service Pack 1.
3. Apply Windows NT Option Pack 4.0 (including Internet Information Server and Microsoft Transaction Server).
4. Apply (or reapply) Windows NT Service Pack 4.0 or higher.
5. Apply the Y2K and the MDAC patches included with Windows NT Service Pack 4.0.
6. Install TAPI Server or, if running on separate servers, Remote TAPI Service Provider.
7. If you have your TAPI Service Provider on a separate server, type **tcmsetup /c <remoteservername>**, where <remoteservername> is the machine name or IP address of the telephony server.



This completes the server pre-installation.

TAPI Server configuration

When to use

The purpose of this section is to indicate the TAPI Server settings that are required for Symposium Agent. This guide does not explain the configuration of the TAPI server.

For detailed instructions, refer to your TAPI documentation.

To configure the TAPI Server for Symposium Agent

1. Run TCMApp on the TAPI Server to set the lines that each client will be allowed to use.
2. Add users to the telephony server. The users that you add must already be part of the same Windows NT domain as the telephony server.
3. For each user, assign all of the available lines.
4. If you need to add or change lines to a User, choose User › Change Selected User's Line Access in the TAPI Administration Application.

Installing and configuring the License Manager

When to use

Before you can use Symposium Agent Release 2.3, you must install and configure the License Manager software and license file. You obtain the license file (license.dat) from your distributor.

Before you begin

Ensure that the Symposium Agent Dongle is attached to the parallel (printer) port of the computer on which you are installing the License Manager.

Where to install the License Manager

You can install the License Manager software on the same server as the Symposium Agent Database, or on another computer.

Note: If you have an existing license server for other Nortel Networks products, then you can use this license server for Symposium Agent as well. Plug the Symposium Agent Dongle into the license server printer port, and then replace the existing license.dat file with the updated file that you received from your Nortel Networks distributor.

To install the License Manager

1. Insert the Symposium Agent CD-ROM into the CD-ROM drive.
2. Choose Run from the Windows Start menu.
3. Click Browse.
4. Go to the License Manager folder on the CD-ROM, and double-click setup.
5. Click OK.

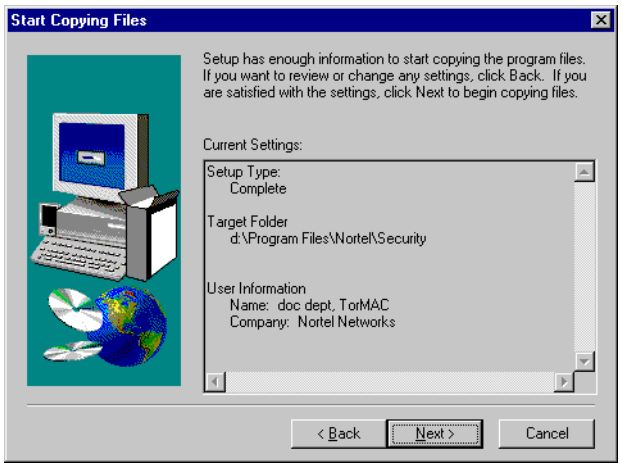
Result: The Choose Destination Location dialog box appears.

Choose Destination Location
Setup will install Nortel Security in the following directory.
To install to this directory, click Next.
To install to a different directory, click Browse and select another directory.
You can choose not to install Nortel Security by clicking Cancel to exit Setup.
Destination Directory
C:\Program Files\Nortel\Security
Browse...
< Back
Next >
Cancel

6 To change the destination folder, click Browse, and select the desired folder.

7 Click Next.

Result: The Start Copying Files dialog box appears.


Start Copying Files
Setup has enough information to start copying the program files. If you want to review or change any settings, click Back. If you are satisfied with the settings, click Next to begin copying files.
Current Settings:
Setup Type:
Complete
Target Folder
d:\Program Files\Nortel\Security
User Information
Name: doc dept, TorMAC
Company: Nortel Networks
< Back
Next >
Cancel

8 Click Next.

Result: The program installs the License Manager and closes.

9 Continue with the following procedure to install the license file.

To install the license file

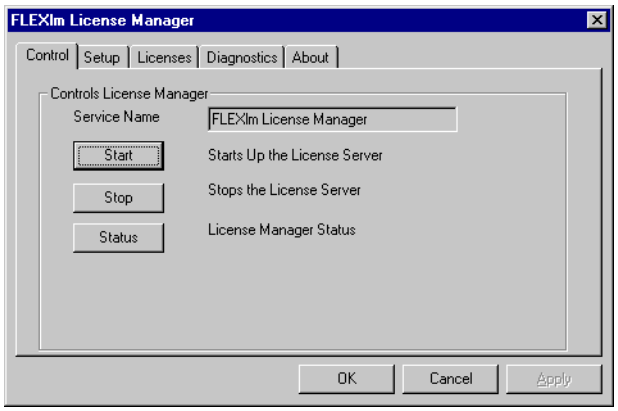
1 Make a backup copy of the License.dat file supplied by your distributor, and store it in a safe place.

2 Copy the License.dat file to the \WINNT\System32 folder.

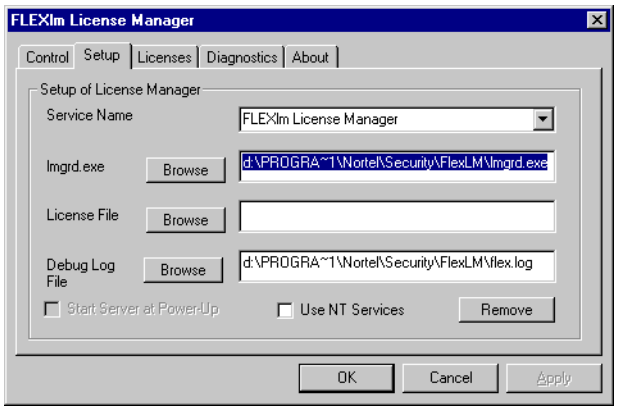
To configure the License Manager

1 From the Windows Start menu, choose Programs › Nortel › Security › FlexLM Control Panel.

Result: The FLEXlm License Manager property sheet opens.



2 Select the Setup tab to display the Setup fields.



Attention: Do not click Remove. This button removes the License Manager from the NT Services. If the License Manager is removed, then the TAPI server cannot communicate with Symposium Agent.

3 Click Browse to locate the Lmgrd.exe file.

The default is the directory in which you installed the Nortel Security software (for example, C:\Program Files\Nortel Security\FlexLM\).

4 Click Browse to locate the License.dat file.

This file is in the directory to which you copied it in the previous procedure.

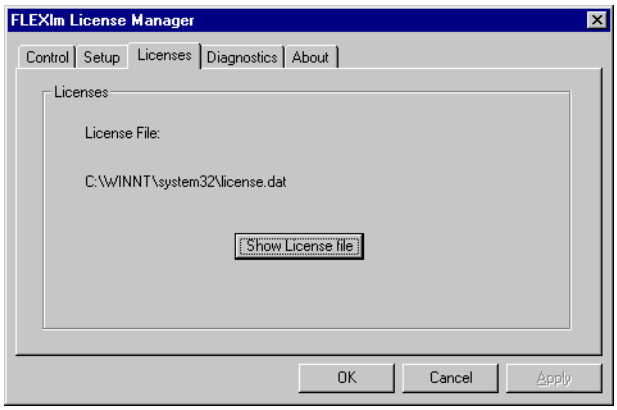
Note: The recommended location is the \WINNT\System32 directory.

5 Check Use NT Services and Start Server at Power-Up.

The License Manager service must be started before the TAPI server can communicate with Symposium Agent.

Note: You can also start the License Manager manually by clicking the Start button on the Control property page.

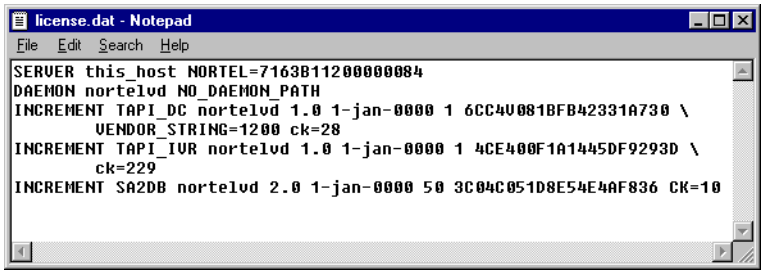
6 Click Apply, and then select the Licenses tab.



7 Click Show License file.

Result: The license.dat file opens.

Note: The following text shows a sample license file. Your license file may look different, depending on the options that you purchased.


license.dat - Notepad
File Edit Search Help
SERVER this_host NORTEL=7163B11200000084
DAEMON nortelvd NO_DAEMON_PATH
INCREMENT TAPI_DC nortelvd 1.0 1-jan-0000 1 6CC4V081BFB42331A730 \
VENDOR_STRING=1200 ck=28
INCREMENT TAPI_IVR nortelvd 1.0 1-jan-0000 1 4CE400F1A1445DF9293D \
ck=229
INCREMENT SA2DB nortelvd 2.0 1-jan-0000 50 3C04C051D8E54E4AF836 CK=10

8 For Symposium Agent Release 2.3 support, verify (but do not edit) that the text that appears in the last line of the example above is included in your license file.

Note: This may not be the last line of your license file.

The following table explains the meaning of the text that appears in the last line of the license file shown above:

SA2SB	The Symposium Agent feature.
2.3	The product version number. This value must be 2.3.
50	The number of users (agents, supervisors, and administrators) that can be logged on at one time.

9 On the SERVER line, replace this_host with the host name of your computer.

Note: This name must be exact. To find the host name of your computer, click the Hostid's button on the Diagnostics tab.

Attention: Edit only the this_host field. Editing other fields corrupts the license.dat file and prevents the License Manager from running.

10 Choose File › Exit, and then click Yes to save your changes.

11 Click Apply, and then click OK to save your changes to the FlexLM configuration.

Installing Symposium Agent software

When to use

The Symposium Agent Software installation menu should start automatically when you insert the Symposium Agent CD. If not, use Windows Explorer to open the CD-ROM drive and start the nnSAMenu.exe program. You must be logged on as a local Administrator to install any of the Symposium Agent software packages.

The Symposium Agent Software installation menu allows you to:

- View the Readme file
- Install Acrobat Reader
- Install the database
- Install Symposium Agent Server
- Quit the installation

New installations

If this is a new installation of Symposium Agent and Sybase is *not* installed on the Server, you can install both the Symposium Agent Server files and Sybase 12.0 now by selecting each of the appropriate options.

Upgrade installations

If this is an upgrade installation from Symposium Agent 2.0 or 2.0.1 where Sybase 11.5 is already installed on the Server, you should only install the Symposium Agent Server files now. You will be instructed on when to install the new database files later in the section, "Upgrading your Sybase database."

Installing Symposium Agent Server files

After selecting the "Install Symposium Agent Server" menu option, the InstallShield wizard for the Symposium Agent 2.3 Server begins.

If you have an older version of Symposium Agent installed (Symposium Agent 2.0 or 2.1), the install detects it and automatically removes the old software after prompting the user. If you answer "No" to automatically remove the older version, the installer exits without installing the new version.

If you have an older revision of the same version of software (Symposium Agent 2.3.x.x), the install automatically starts the removal of the current version, but still prompts the user before actually removing the product. You must then select "Install Symposium Agent Server" from the Software installation menu again to install the current version.

Once all previous versions and revisions of Symposium Agent are removed from the Server, the Install wizard walks you through the Symposium Agent 2.3 Server installation.

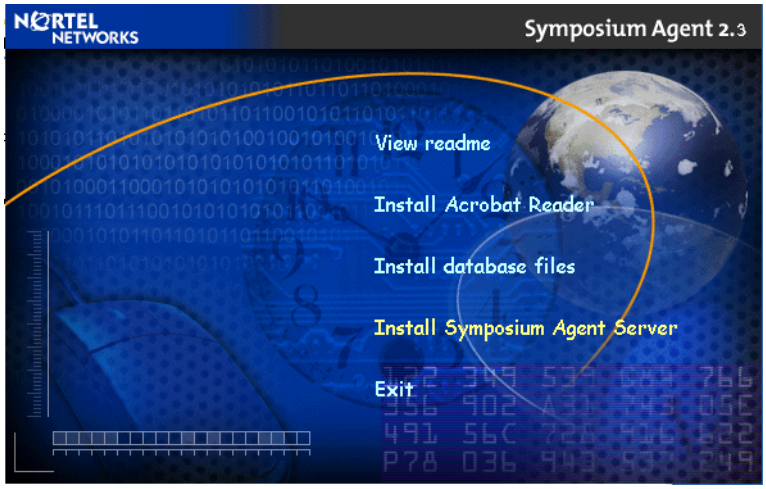
Installing the database files

After selecting the "Install database files" menu option, you are prompted for a Drive and folder in which to install the database files. The drive should have at least 2 GB of free space available. Once you select a Drive and folder, the system automatically copies the database access files, server files, and creates the initial database server instance. **The server will reboot twice during the copying of files, and will pause for several minutes after the second reboot while creating the database instance.**

Once the database creation is complete, the Symposium Agent software installation menu re-appears. Now, you can choose the "Install Symposium Agent Server" menu option.

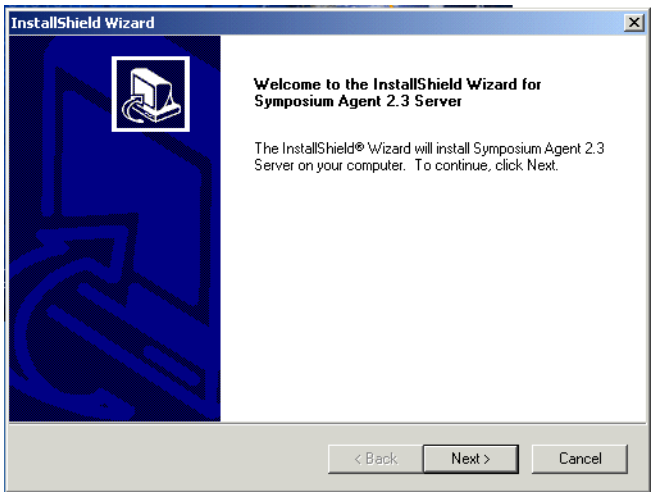
To install the server software

1. Log on to Windows NT using the Administrator user ID to install this software.
2. Insert the Symposium Agent Release 2.3 CD-ROM into the CD-ROM drive.
3. If Symposium Agent install menu does not start automatically choose Start › Run, and type **d:\nnsamenu.exe**, where d: is the letter of the CD-ROM drive, and then click OK.



4 Click Install Symposium Agent Server.

Result: The Welcome Symposium Agent window appears.


InstallShield Wizard
Welcome to the InstallShield Wizard for Symposium Agent 2.3 Server
The InstallShield® Wizard will install Symposium Agent 2.3 Server on your computer. To continue, click Next.
< Back
Next >
Cancel

5 Click Next.

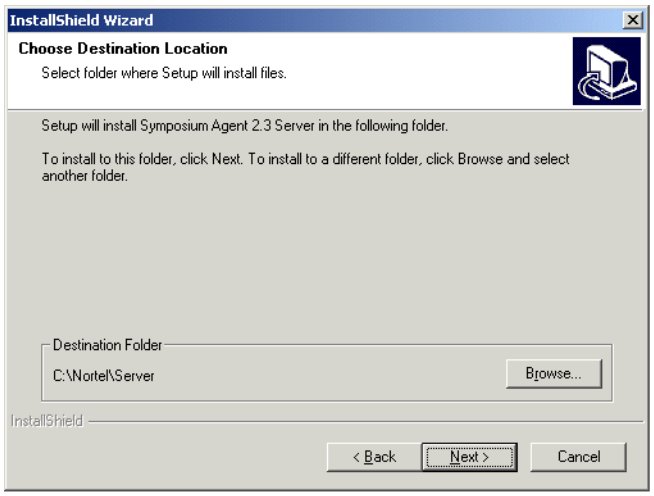
Result: The Software License Agreement window appears.

InstallShield Wizard
License Agreement
Please read the following license agreement carefully.
Press the PAGE DOWN key to see the rest of the agreement.
SOFTWARE LICENSE
NORTEL NETWORKS INC. ("NORTEL NETWORKS") TELECOMMUNICATIONS PRODUCTS
THIS LEGAL DOCUMENT IS A LICENSE AGREEMENT ("License") BETWEEN YOU, THE END-USER ("CUSTOMER") AND NORTEL NETWORKS. PLEASE READ THIS LICENSE CAREFULLY BEFORE USING AND/OR DOWNLOADING THE SOFTWARE. BY USING OR DOWNLOADING THIS SOFTWARE, YOU, THE CUSTOMER, ARE AGREEING TO BE BOUND BY THE TERMS OF THIS LICENSE. IF YOU DO NOT AGREE TO THE TERMS OF THIS LICENSE, DO NOT DOWNLOAD THIS
Do you accept all the terms of the preceding License Agreement? If you choose No, the setup will close. To install Symposium Agent 2.3 Server, you must accept this agreement.
InstallShield
< Back
Yes
No

6 Click Yes to accept the Software License Agreement.

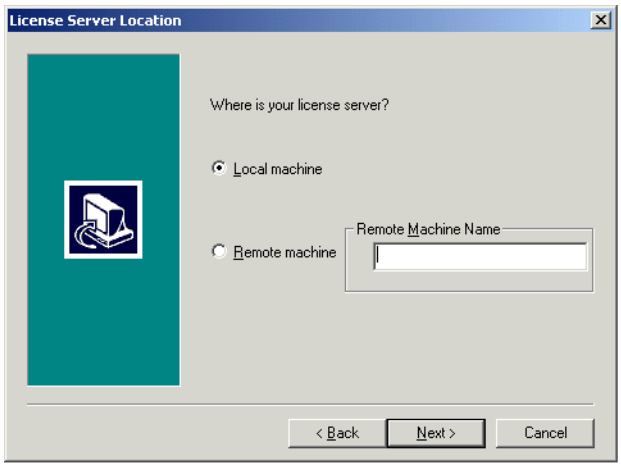
Note: If you choose No, the Exit Setup window will appear.

Result: The Choose Destination Location window appears.


InstallShield Wizard
Choose Destination Location
Select folder where Setup will install files.
Setup will install Symposium Agent 2.3 Server in the following folder.
To install to this folder, click Next. To install to a different folder, click Browse and select another folder.
Destination Folder
C:\Nortel\Server
Browse...
InstallShield
< Back
Next >
Cancel

7 Choose a location for the Symposium Agent files, and then click Next.

Result: The License Server Location window appears.



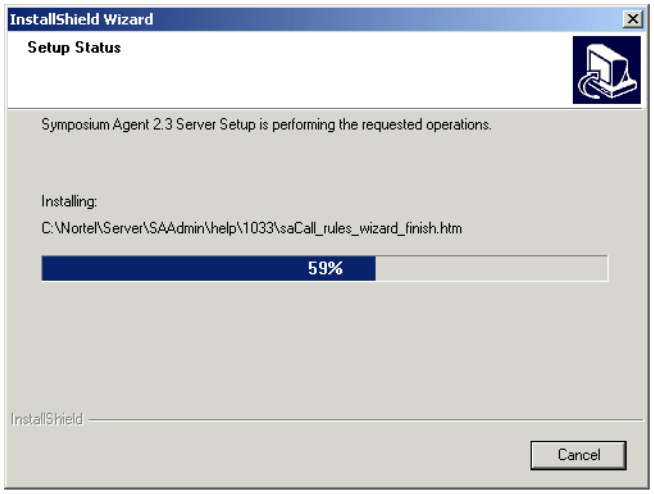
8 Indicate the server on which the license file is or will be installed.

If this is the same computer on which you are installing the current software, then select Local Machine.

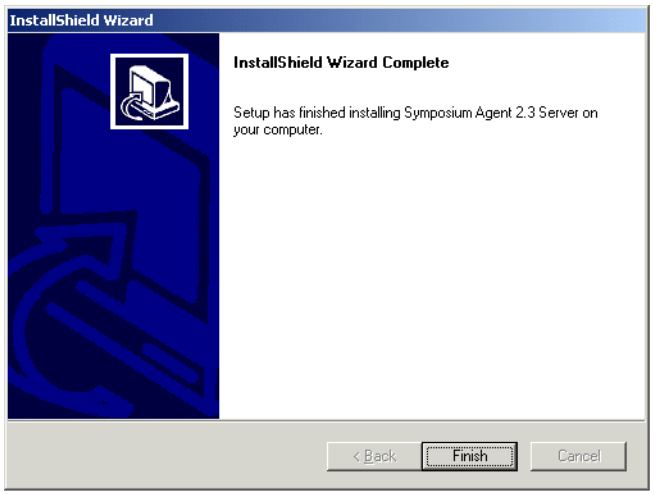
If you are using another computer, then select Remote Machine, and type the computer name in the Remote Machine Name box.

9 Click Next.

Result: Setup copies the files to your computer.



10 When Setup finishes copying the files, click Finish to restart the computer.



This completes the initial installation of the server portion of Symposium Agent.

Chapter 3

Configuring the server

In this chapter

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Section A: New installation

In this section

New Installation: Configuring the database 40
Configuring the Symposium Agent services 45
New Installation: Configuring the Microsoft Transaction Server package 47
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New Installation: Configuring the database

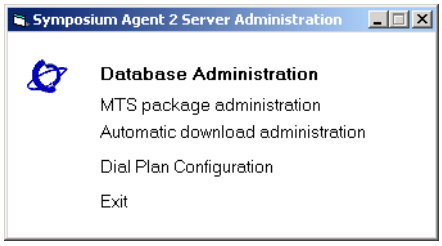
When to use

The database administration utility configures the Symposium Agent database schema. It allows you to optimize the database according to the computer's hardware. By using the custom installation, you take advantage of extra RAM and disk drives that the default installation ignores.

To configure the database

1 From the Windows Start menu, choose Settings › Control Panel › Symposium Agent Server, or choose the desktop shortcut SA Server Configuration.

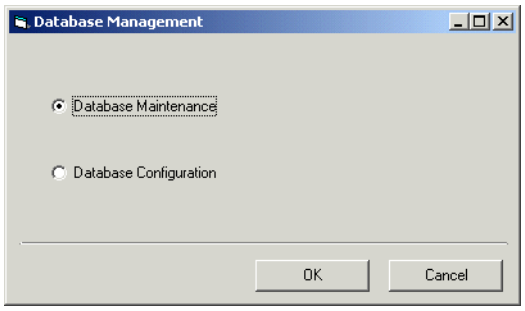
Result: The Symposium Agent 2 Server Administration window appears.



2 Click Database Administration.

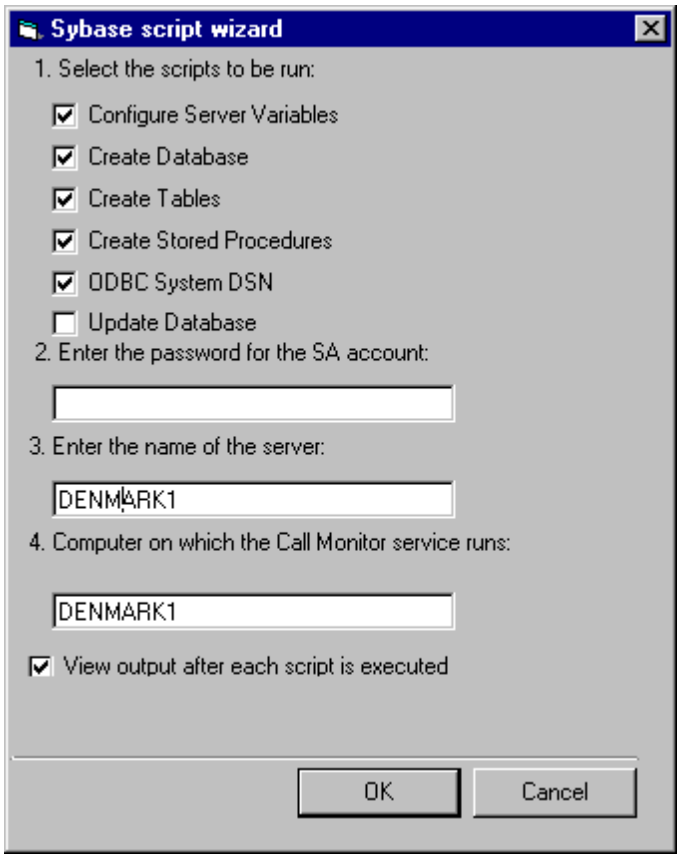
3 If Sybase Adaptive Server is not running, then click Yes at the prompt.

Result: The Symposium Agent 2 Database management window appears.



4 Select Database Configuration, and then click OK.

Result: The Sybase script wizard starts.



5 Select all of the scripts in section 1, except for Update Database.

6 If the SA (Sybase Administrator) account requires a password, then type the password in section 2. By default, the password is empty.

7 In section 3, type the name of the computer that is running Sybase Adaptive Server. By default, the name is the current machine.

8 In section 4, type the name of the computer that is running the Symposium Agent Call Monitor service. By default, the name is the current machine.

9 If you do not want to view the output after the execution of each SQL script, then clear the View output check box.

It is recommended that you check the output files for errors once all the scripts have executed. Errors in the configuration of the server and the creation of the database output files could indicate that the database was not properly created.

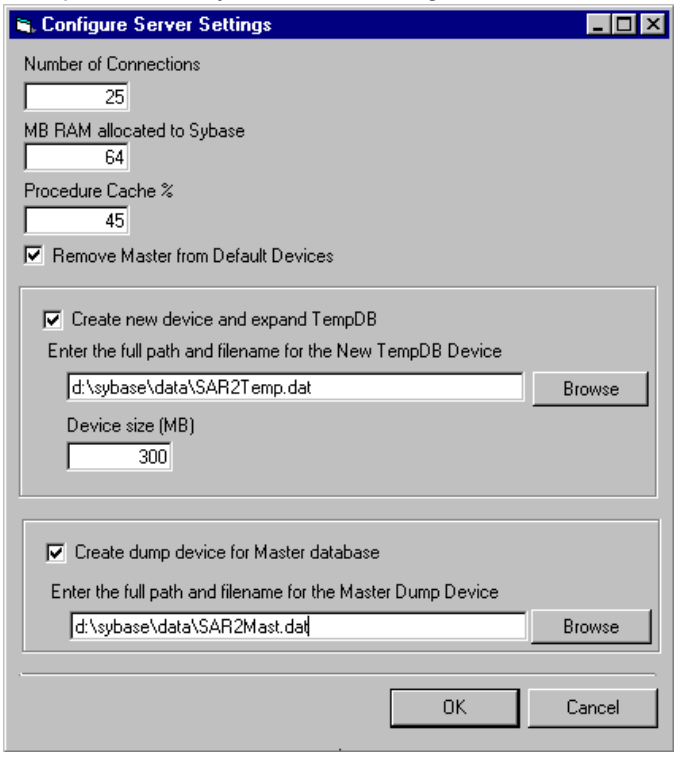
Note: If you select this option, then you are prompted to review the results of each executed script. Deselect this option for a faster installation.

All script output files are saved in the directory where you installed Symposium Agent, in the subdirectory NNDBCfg. By default, this directory is C:\Nortel\Server\NNDBCfg.

10 Click OK.

Result: The Configure Server Settings window appears.

11 Choose the appropriate settings for your hardware configuration, and enter the paths and filenames for the new devices. The following figure shows example data that you can use as a guideline.



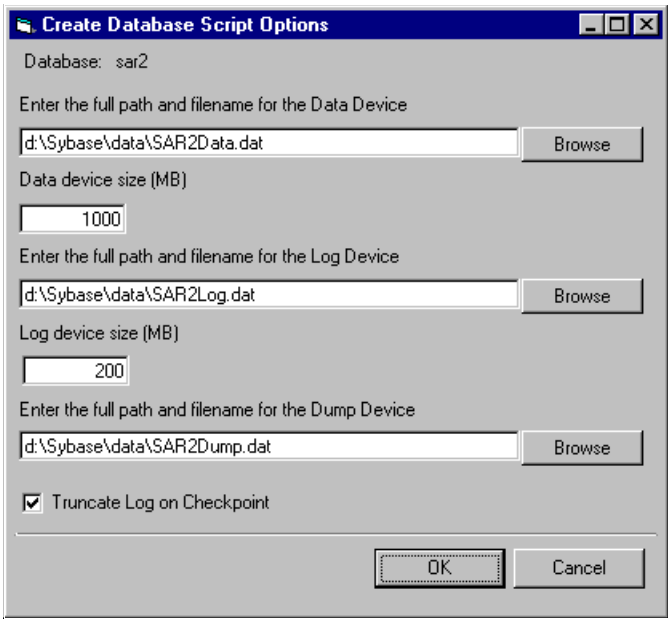
12 Click OK to start executing SQL scripts.

13 If you chose to view the SQL script output, then the script output window appears for each script. Click OK to dismiss each dialog box.

Result: The Create Database Script Options window appears.

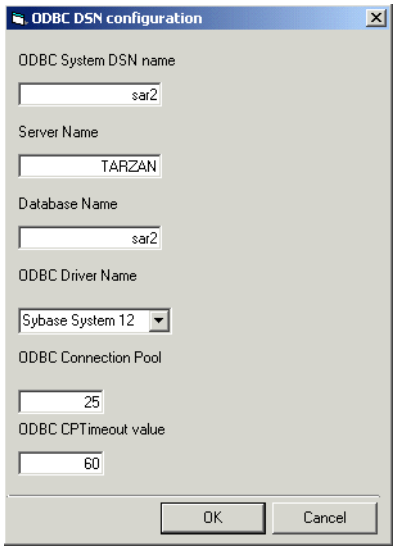
14 Type the paths and filenames for the Symposium Agent Release 2.3 data, log, and dump devices.

The following figure shows sample data that you can use as a guideline.



15 Click OK.

Result: The configuration application begins to generate the database. This can take 20 minutes or longer, depending on your hardware and processor speed. When it is complete, the ODBC DSN configuration window appears.



16 Review the default settings for the creation of a data source name (DSN), and then click OK.

17 When you see the confirmation that the data source name has been entered in the registry, click OK.

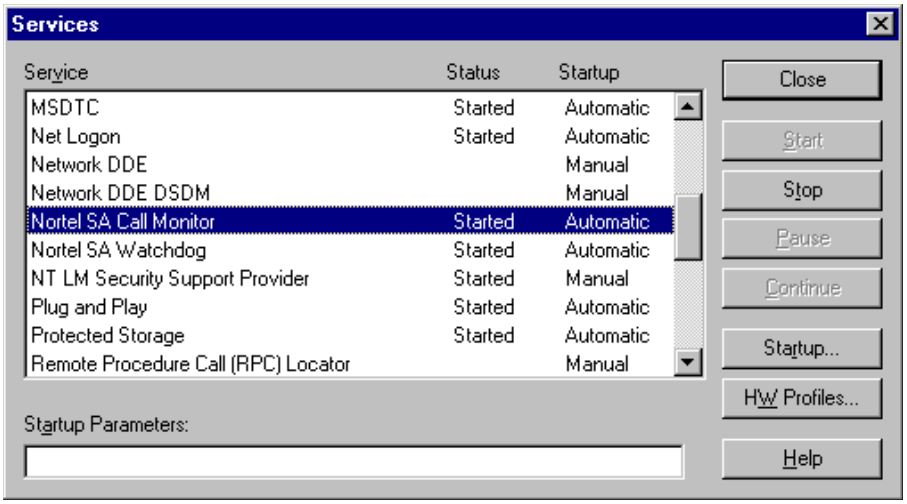
Configuring the Symposium Agent services

When to use

Symposium Agent uses two Windows NT services to monitor the system. These services must be running to provide event and call logging.

To configure the Symposium Agent services

1 On the server running Symposium Agent service, choose Start › Settings › Control Panel › Services.



2 Select Nortel SA Call Monitor, and then click Startup.

3 Select Automatic, and then click OK.

4 With Nortel SA Call Monitor still selected, click the Start button.

Result: The service starts, and is now set to start automatically whenever you start the computer.

5 Select Nortel SA Watchdog, and then click Startup.

6 Select Automatic, and then click OK.

7 With Nortel SA Watchdog still selected, click the Start button.

Result: The service starts, and is now set to start automatically whenever you start the computer.

8 Click Close.

This completes the configuration of the Symposium Agent services.

New Installation: Configuring the Microsoft Transaction Server package

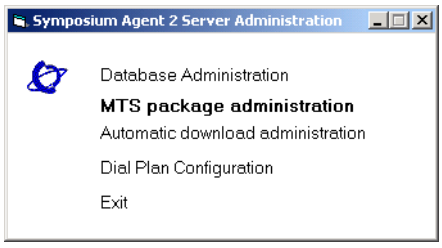
When to use

Symposium Agent uses the Microsoft Transaction Server (MTS) to manage database connections between the client and the server. During the installation, you create MTS packages by using the MTS Administration utility. The MTS Administration utility copies the packages to the software download directory, SASWDIST.

To configure the MTS

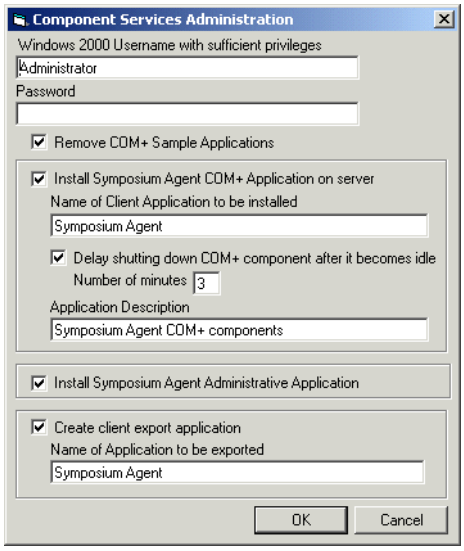
1 From the Windows Start menu, choose Settings › Control Panel › Symposium Agent Server, or choose the desktop shortcut SA Server Configuration.

Result: The Symposium Agent 2 Server Administration window appears.



2 Click Database MTS package administration.

Result: The MTS Administration window opens.



3 Enter <DOMAINNAME>\Administrator.

Note: You must use Administrator or for Configuring the Microsoft Transaction Server (MTS) Package. Do not use any other ID that has administrator privileges.

4 In the Password box, type the password for the administrator account.

5 Unless you have reason to change the remaining values, accept the defaults.

6 Click OK.

Result: The utility generates the package. This can take a couple of minutes.

7 When the Setup complete message appears, click OK.

Result: The MTS export package is automatically placed in the SASWDIST folder.

Configuring a dialing plan (optional)

When to use

A dialing plan is a computerized rule book that contains instructions on how to dial telephone calls from a given location. Each location has its own set of rules. A dialing plan consists of a location, rules, and macros. The Symposium Agent software analyzes each telephone number and adds or removes digits according to a set of rules. For example, if you must dial 9, 1, and then the area code to reach a certain number, you can include this information in a dialing plan.

If you are not using a dialing plan, then you can skip this section. If you need to implement a dialing plan later, then see the online Help for complete instructions.

Note: Complete instructions for dialing plans are in the online Help. Look for the Dialing Plans entry in the Help Table of Contents.

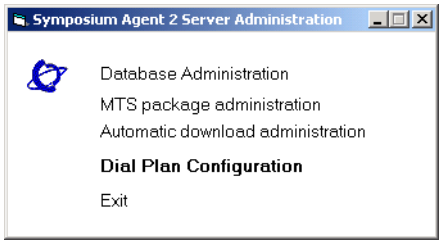
Derived rules

A derived rule is a rule that the Symposium Agent software generates for you. You provide the initial telephone number and the way that the number should look when it is dialed from the location. The software analyzes the two numbers and creates the rule.

To add a location

1 From the Windows Start menu, choose Settings › Control Panel › Symposium Agent Server.

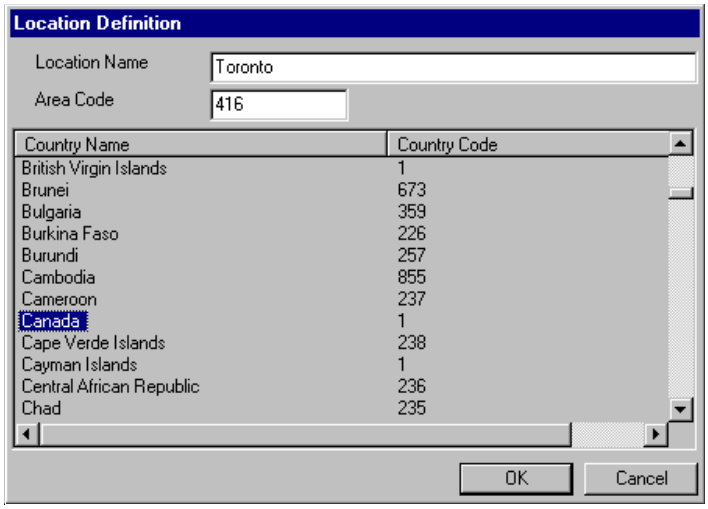
Result: The Symposium Agent Server Administration window appears.



2 Click Dial Plan Configuration.

3 Choose Locations › New.

Result: The Location Definition window appears.



4 In the Location Name box, type a name for the location (for example, Toronto).

5 In the Area Code box, type the area code for the location (for example, 416).

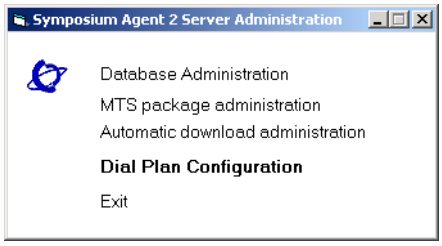
6 From the list of country names, select the country name (for example, Canada).

7 Click OK.

To derive a rule

1 From the Windows Start menu, choose Settings › Control Panel › Symposium Agent Server.

Result: The Symposium Agent Server Administration window appears.

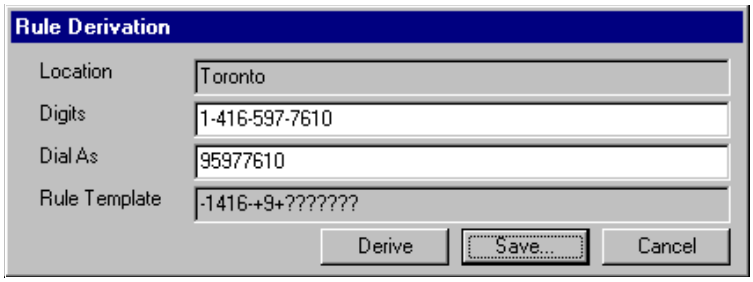


2 Click Dial Plan Configuration.

3 In the Locations box, select the location for which you want to create a rule.

4 Choose Rules › Derive New.

Result: The Rule Derivation window appears.



5 In the Digits box, type the telephone number as your system receives it (for example, 1-416-597-7610).

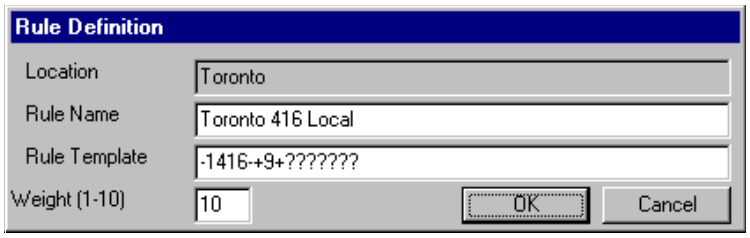
6 In the Dial As box, type the telephone number as you need to dial it from the selected location (for example, 95977610).

7 Click Derive.

Result: The calculation that produces the desired result appears in the Rule Template box.

8 Click Save.

9 In the Rule Name box, type a name for this template (for example, Toronto 416 Local).



10 In the Weight box, type a number from 1 to 10. In case of conflicting rules, the system uses the rule with the highest weight.

Note: Ten is the highest weight, and 1 is the lowest.

11 Click OK.

12 If you have finished creating dialing plans, then click Exit.

Section B: Upgrade installation

In this section

Upgrade Installation: Configuring the database 54
Upgrade Installation: Configuring the Microsoft Transaction Server package 57
Upgrading Sybase from 11.5 to 12.0 60

Upgrade Installation: Configuring the database

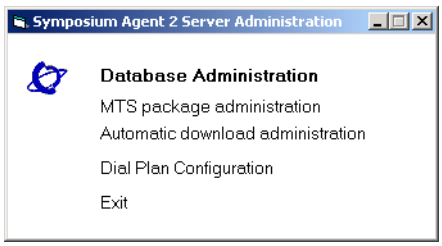
When to use

The database administration utility configures the Symposium Agent database schema. During an upgrade the Sybase script wizard allows you to make selections to upgrade your database without destroying existing data.

To configure the database

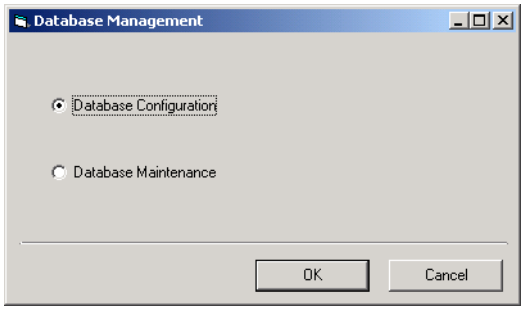
1 From the Windows Start menu, choose Settings › Control Panel › Symposium Agent Server, or select the Desktop shortcut SA Server Configuration.

Result: The Symposium Agent Server Administration window appears.



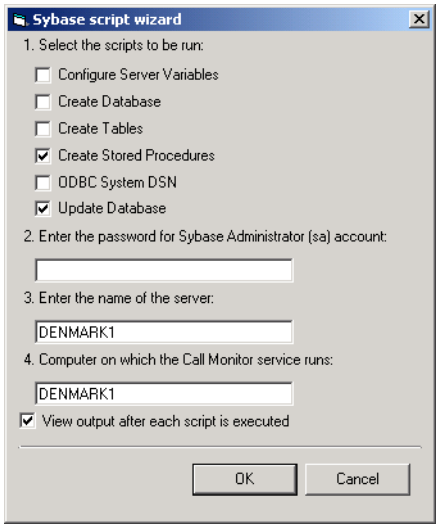
2 Click Database Administration.

3 If Sybase Adaptive Server is not running, then click Yes at the prompt.



4 Select Database Configuration, and then click OK.

Result: The Sybase script wizard starts.



5 Uncheck all options except "Create Stored Procedures" and "Update Database".

6 If the SA (Sybase Administrator) account requires a password, then type the password in section 2. By default the password is empty.

7 In section 2, type the name of the computer that is running Sybase Adaptive Server. By default, it was the name that was previously configured. Select this default.

8 In section 4, type the name of the computer running the Symposium Agent Call Monitor service. By default, it was the name that was previously configured. Select this default.

9 If you do not want to view the output after the execution of each SQL script, then clear the View output check box.

Note: If you select this option, then you are prompted to review the results of each executed script. Deselect this option for a faster installation.

All script output files are saved in the Symposium Agent directory, in the subdirectory NNDBCfg. By default, this directory is C:\Nortel\Server\NNDBCfg.

10 Click OK.

Result: Various dialog boxes are displayed to indicate progress with the updating of the database to the latest schema as well as the creation of the stored procedures. It will update the Application Text Strings as well as the English Strings.

Note: During an upgrade it is normal for error messages to appear on the screen in the Lang1033.out file. These messages are caused by inserting duplicate language text strings. These error messages are informational only.

Upgrade Installation: Configuring the Microsoft Transaction Server package

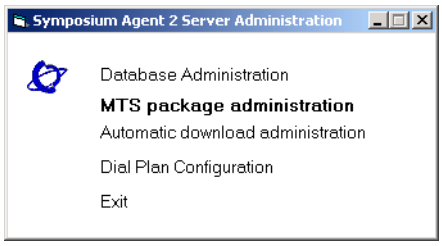
When to use

Symposium Agent uses the Microsoft Transaction Server (MTS) to manage database connections between the client and the server. During the installation, you create MTS packages using the MTS Administration utility. The MTS Administration utility copies the packages to the SASWDIST directory.

To configure the MTS

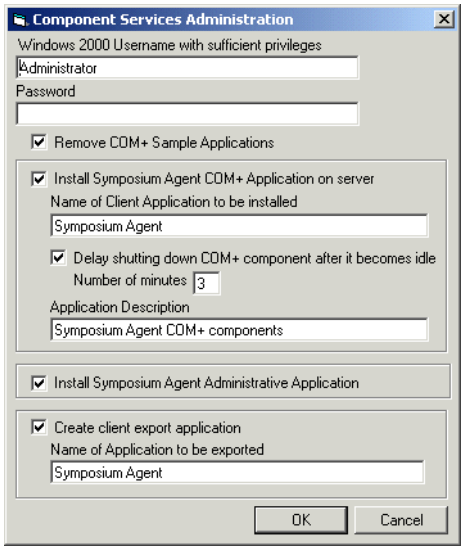
1 From the Windows Start menu, choose Settings › Control Panel › Symposium Agent Server, or select the desktop shortcut SA Server Configuration.

Result: The Symposium Agent Server Administration window appears.



2 Click MTS Package Administration.

Result: The MTS Administration window appears.



3 For NT Username with sufficient privileges, enter Administrator.

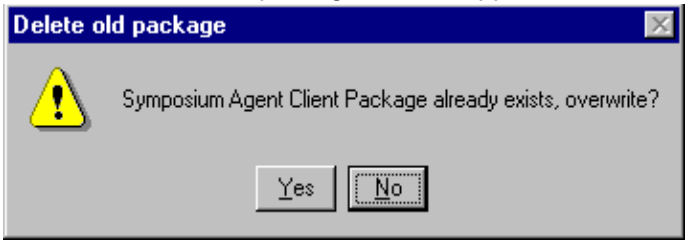
Note: You must use Administrator Configuring the Microsoft Transaction Server (MTS) Package. Do not use any other UserID that has Administrator rights.

4 In the Password box, type the password for the account.

5 Unless you have reason to change the remaining values, accept the defaults.

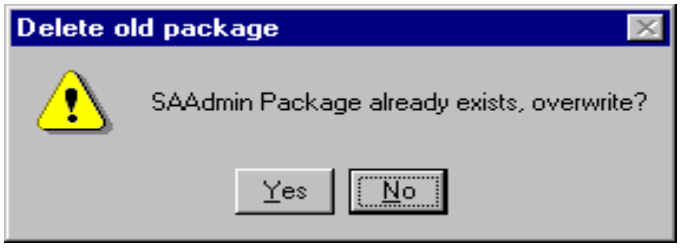
6 Click OK.

Result: The Delete old package window appears.



7 Click Yes.

Result: The Delete old package window appears.



8 Click Yes.

Result: The utility generates the package.

9 When the Setup complete message appears, click OK.

Result: The MTS export package is automatically placed in the SASWDIST folder.

Upgrade installation: update the Call Rules Explorer

When to use

Use these procedures when you are upgrading from an earlier version of the software.

1 From the Windows Start menu, choose Programs › Windows NT Explorer.

2 Double-click on Winnt. Double-click on Downloaded Program Files.

3 Right-click on NNExWrap.ucExplorer.

4 Select Remove.

5 Click on Yes to any question asked about removing a file. You may not be prompted to remove individual files.

Upgrading Sybase from 11.5 to 12.0

When to use

If you are upgrading Symposium Agent from any version of 2.0 or 2.1, the database must be upgraded from Sybase release 11.5 to 12.0.

Ensure to close all other applications and stop the SQL service (for example, SQLSERVER_ <COMPUTERNAME) prior to the upgrade process. Having other applications running may cause the upgrade process to fail.

The upgrade process consists of the following steps:

1. Reboot to Symposium Agent server and restart all services

The Symposium Agent server should be restarted to ensure that no other applications are running while the other database is upgraded. Once the server is restarted shutdown the following services on the services applet in Control Panel:

- Call Monitor
- Watch Dog

Set the startup mode for both services manually to prevent these services form starting up during the reboots that will occur during the database installation. Once the database has been upgraded you can set the startup mode back to automatic.

2. Install Symposium Agent 2.3 Server
3. Backup the current 11.5.1 database
4. Run the pre-upgrade script
5. Stop the SQL service.
6. Run the Sybase ASE 12.0 installation
7. Restore functionality in the ASE

Install Symposium Agent 2.3 Server

- You must install Symposium Agent 2.3 and the run the normal upgrade procedures as defined in the install guide or readme file. Verify that the system was updated properly by accessing the SAAdmin web pages and also logging in a SA client.
- The previously installed version of the server must be running. Check to see that the SQL service is running in the service control panel applet.
- Make sure that all users are logged off of the SA system.

Back up Databases

As a precautionary measure make a backup of your databases before continuing on with the database upgrade. Use the dump database command to back up your databases. If you encounter any problems during the upgrade, you may need these dumps to recover the previous installation.

The Sybase isql tool will be used to dump the database.

- Make sure the Sybase Backup Service has been started. i.e. BCKSERVER_<COMPUTERNAME>_BS
- Bring up a DOS-prompt.
- Type "isql –Usa –P" -S<COMPUTERNAME>.
- You will be presented with a "1>" prompt.

Dump the master database. At the prompt use the following commands to dump master database:

1>dump database master to master_disk_dump

2>go

Dump the sar2 database. At the prompt use the following commands to dump sar2 database.

1>dump database sar2 to smar2_disk_dump

2>go

3>exit

Run the Pre-upgrade script

The upgrade script will create a sybsystemdb Database and increase the size of sybsystemprocs database.

In version 12.0, all servers must have a sybsystemdb database. Version 12.0 uses this database for tracking transactions and during recovery.

The minimum size for sybsystemprocs is 80MB. If your sybsystemprocs is smaller than 80MB the upgrade script will increase the size of this database.

The Sybase isql tool will be used to run the upgrade script to create a new sybsystemdb database and increase the size of sybsystemprocs.

Before you run the isql command, you may need to edit the upgrade.sql file to reference the default location for your Sybase database files. If the default drive is not the "c:\" then you will need to edit the upgrade.sql file.

- Using notepad, open the upgrade.sql file, located under Nortel\server\nndbcfg
- Search for physname="c:/Sybase/data"
- Replace the “c” in the pathname with the drive where Sybase is installed. For example, if your Sybase is on the D drive, the above line will look like this physname= “d:/Sybase/data…”
- There are three instances of this line in the file. Update all three lines.

Now run the following command (all on the same line) to execute the upgrade script:

isql –Usa –P –i x:\Nortel\server\nndbcfg\upgrade.sql –o x:\Nortel\server\nndbcfg\upgrade.out

Note: X is the drive on which you have installed your Symposium Agent server files.

Stop the SQL services

From the services control panel applet stop the SQL services. i.e. Sybase SQLSERVER_<COMPUTERNAME>

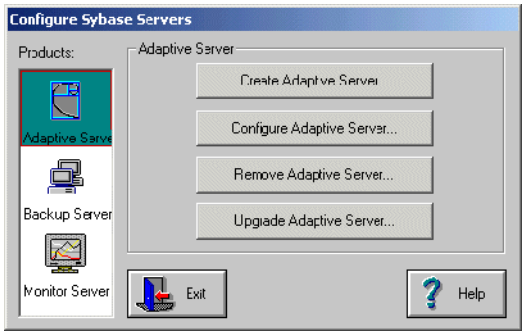
Run Sybase ASE 12.0 installation

From the SA Server CD-ROM, run the Symposium Agent Software installation menu program, "nnsamenu.exe", and click on the "Install database files" option. You will be prompted for a drive and folder in which to install the new database files. The drive should have at least 500MB of free space. Then, a series of batch files will be started that copy the Sybase ASE v12.0 client and server files. **The server will automatically reboot twice during this process.**

To complete the upgrade process and convert your existing database to the 12.0 format, use the Sybase Server Config program and execute the following steps:

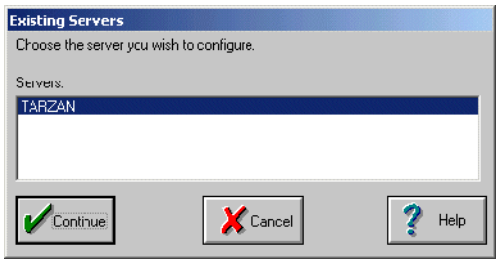
1 Start the Server Config program from Start Menu->Sybase->Server Config

2 Click Configure Adaptive Server in the Configure Sybase Servers window.



3 In the Existing Servers window, select the Adaptive Server or SQL Server.

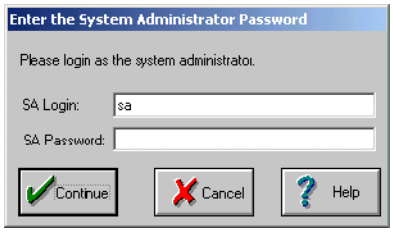
4 Click Configure Adaptive Server.



5 Click Continue.

When Sybase detects that the selected database needs to be upgraded, it will prompt you with a series of dialogs that will walk you through the rest of the database upgrade process.

6 In the Enter the System Administrator Password window, type the Sybase administrator login name and password.



7 Select continue.

8 If the Adaptive Server is not running, the upgrade program starts it for you.

9 When prompted backup your database and confirm proceeding with the upgrade.

a. If you have not backed-up the existing database, choose "No" in the Upgrade window and use NNDBCFG tool or use dump database command to make backup copies.

b. If you have made the necessary backups, select "Yes". The installer begins the database eligibility test to assure that the Pre-Upgrade steps (above) have been completed.

10 Sybase will now complete the upgrade changes to your database.

Restoring Functionality in ASE

The Sybase isql tool will be used to reset SAR2 database options:

- Bring up a DOS-prompt.
- Type "isql –Usa –P".
- You will be presented with a ">" prompt.

Use the following commands to reset SAR2 database options:

1>sp_dboption sybsystemprocs, ‘trunc log on chkpt’, true

2>go

```
3>sp_dboption sar2, 'trunc log on chkpt', true
4>go
```

Chapter 4

Symposium Agent administration

In this chapter

Running the Symposium Agent Administration Tool 68

Configuring the general system settings 72

Creating tabs 74

Configuring the default profile 76

Adding agents and other users 77

Associating lines, machines, and default users 78

Creating call rules 80

Using the online Help 82

Database maintenance procedures 84

Running the Symposium Agent Administration Tool

When to use

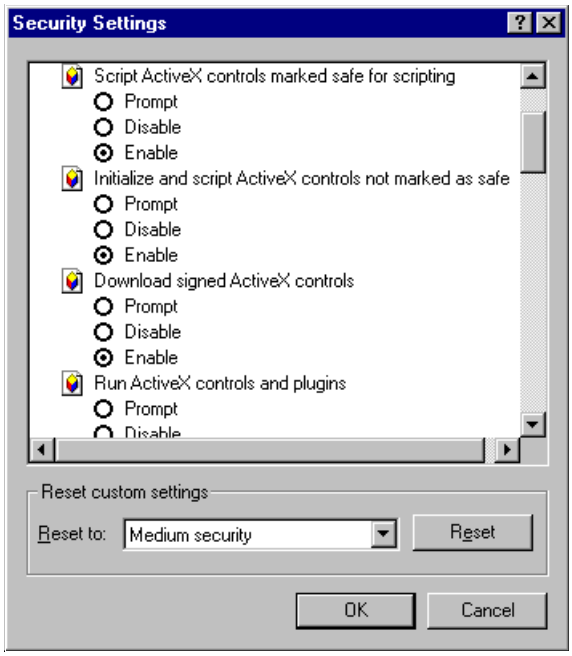
This part of the configuration uses the browser-based Symposium Agent Administration Tool that is installed as part of the Symposium Agent setup. You can use the browser-based Administration Tool from any computer on your local area network.

Note: For remote administration of Call Rules, the Symposium Agent client software needs to be installed in order for Call Rules Explorer to run on a system other than the Symposium Agent server.

Because the Administration Tool and online Help use ActiveX controls, you must use Internet Explorer 4.01 (or higher) as your browser and configure special security settings on the intranet zone. Depending on the version of the browser you use, you may also need to execute a file called hhupd.exe to update your Help ActiveX controls. You can find hhupd.exe in the directory in which you installed the Symposium Agent server software, in the Dial Plan directory. The default directory is c:\Nortel\Server\DialPlan\hhupd.exe.

To lower Internet Explorer security settings

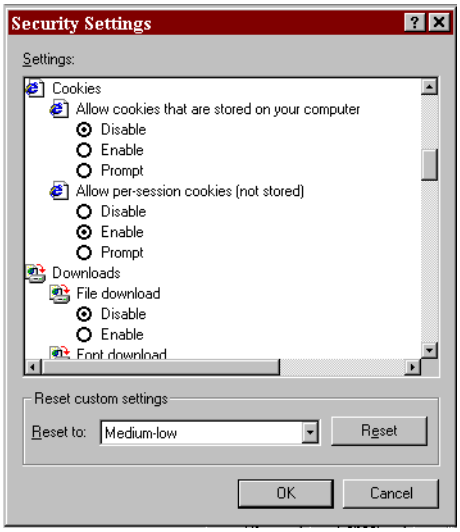
1. In Internet Explorer, choose View › Internet Options.
2. Select the Security tab.
3. In the Zone box, select Local intranet zone.
4. Select Custom (for expert users), and then click Settings.
5. Set the following ActiveX Controls and plug-ins options to Enable:
   - Script ActiveX controls marked safe for scripting
   - Download signed ActiveX controls
   - Run ActiveX controls and plug-ins



6 Click OK twice.

7 Set the following cookies option to Enable:

- Allow per-session cookies



8 Close the browser.

To log on to the Symposium Agent Administration Tool

1 On any computer in the domain, open Internet Explorer.

Note: Ensure that the security settings have been adjusted as explained in the previous procedure.

2 In the Address box, type the URL of your Symposium Agent server (for example, **http://<hostname>/saadmin**, where <hostname> is the name or IP address of the Internet Information Server that Symposium Agent uses), and then press Enter.

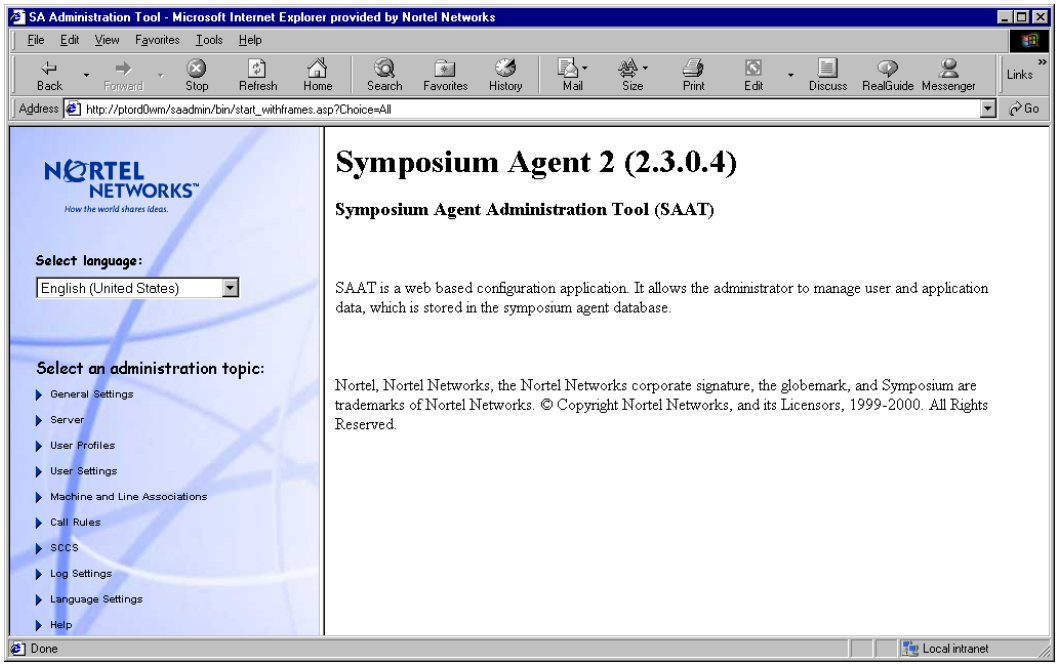
3 In the User Name box, type the user ID that has administrative privileges on the Symposium Agent server.

Note: The appearance of your window may differ from the graphic shown here.

Note: The client software must be loaded if you wish to remotely administer Call Rules as explained on page 68.

4 Enter the password, and then click OK.

Result: Internet Explorer navigates to the Symposium Agent Administration Tool.


SA Administration Tool - Microsoft Internet Explorer provided by Nortel Networks
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Size Print Edit Discuss RealGuide Messenger Links
Address http://ptord0wm/saadmin/bin/start_withframes.asp?Choice=All
Go
NORTEL NETWORKS
How the world shares ideas.
Select language:
English (United States)
Select an administration topic:
General Settings
Server
User Profiles
User Settings
Machine and Line Associations
Call Rules
SCCS
Log Settings
Language Settings
Help
Symposium Agent 2 (2.3.0.4)
Symposium Agent Administration Tool (SAAT)
SAAT is a web based configuration application. It allows the administrator to manage user and application data, which is stored in the symposium agent database.
Nortel, Nortel Networks, the Nortel Networks corporate signature, the globemark, and Symposium are trademarks of Nortel Networks. © Copyright Nortel Networks, and its Licensors, 1999-2000. All Rights Reserved.
Done
Local intranet

5 If desired, add the URL to your Internet Explorer Favorites list. To do so, choose Favorites › Add to Favorites, and then click OK.

You can also set the page to be the default start page in Internet Explorer using View › Internet Options.

Tip: If additional languages are installed, then you can change the screen language by making a selection from the Select Language drop-down list box.

Configuring the general system settings

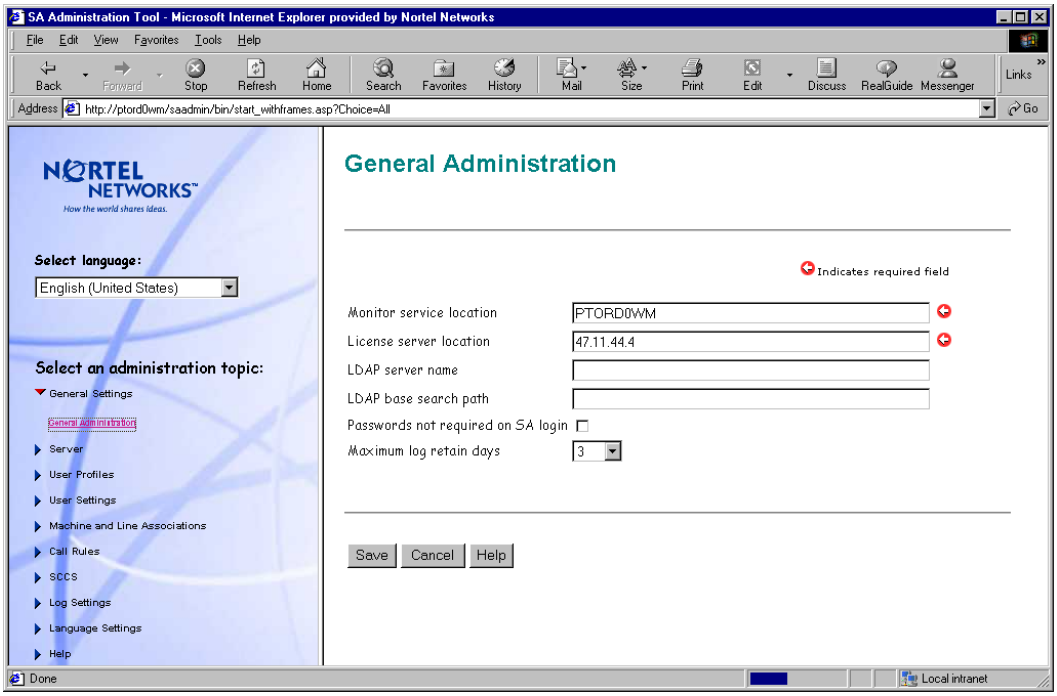
When to use

General settings include the addresses of servers where the monitor, license, and phone directories are located. The following figure shows some example settings.

To configure the general system settings

1 Log on to the Symposium Agent Administration Tool.

2 Expand the General Settings node in the left pane.



3 Click General Administration.

4 On the General Settings pane, at the bottom of the page, click Help.

5 Use the online Help as a guide to configure the fields or accept the default values.

6 Click Save.

Creating tabs

When to use

Tabs are hot links on the Symposium Agent interface. Tabs give agents quick access to HTML pages that contain the information they need to handle calls and other transactions.

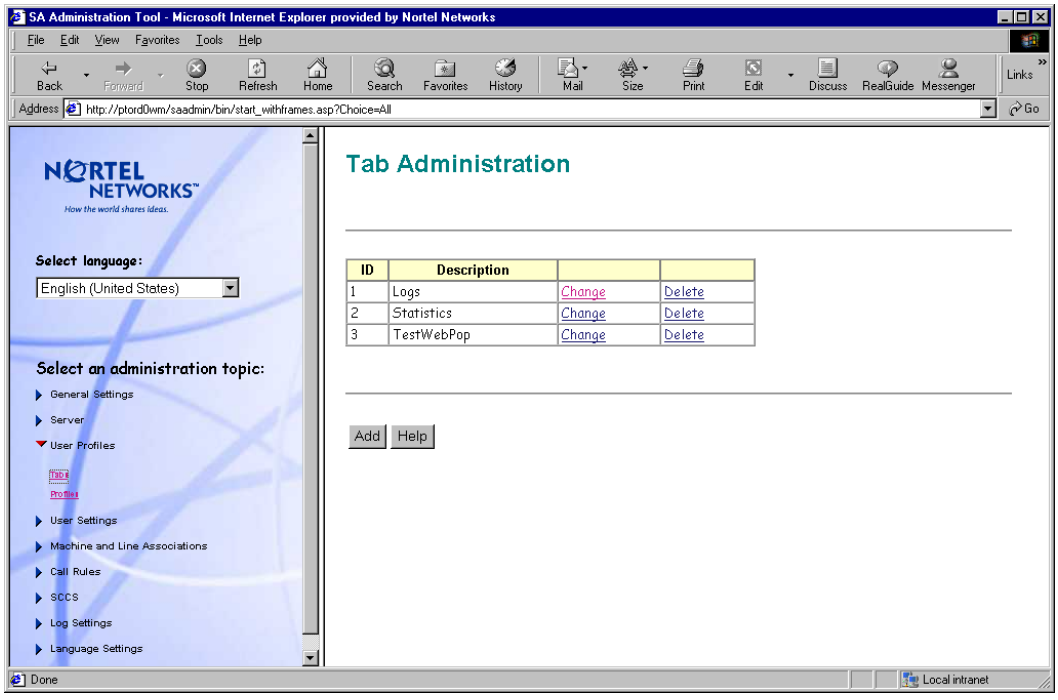
To create tabs

1 Log on to the Symposium Agent Administration Tool.

1 Choose User Profiles › Tabs.

Result: The Tab Administration page appears.

2 Click Add.



3 Type a caption for the tab (for example, CD-ROM).

4 Type the tool tip text for the tab (for example, March CD-ROM campaign).

Note: Tool tip text appears when agents hover their mouse pointer over the tab.

5 If you want the tab to respond to call-related events, then check Allow Telephony Events.

6 If you want the address bar to appear on the Symposium Agent interface, then check Allow full browsing.

7 Type the URLs for the pages to show on startup, call answer, disconnect, and ringing.

8 If you want to pass data as part of the URL, then check the corresponding Post Data check box.

9 Click Save.

Configuring the default profile

When to use

Use profiles to create subsets of the available tabs for different user types.

To create the default profile

1. Log on to the Symposium Agent Administration Tool.
2. Choose User Profiles › Profiles.

   Result: The Profile Administration page appears.
3. In the Profile Description box, locate the Default Profile, and then click Change.
4. In the Available Tabs list, double-click the tabs that you want to include in the profile.

   Result: The tab name moves to the Selected Tabs box.
5. Click Save.

Adding agents and other users

When to use

You must create a user ID in theSymposium Agent Administration Tool for each user before he or she can log on and start working. Each user's database record includes the following information:

- the user's name
- password
- login ID
- default language
- user type
- profile
- speed dial list
- dialing plan
- ACD information

To create users

1. Log on to the Symposium Agent Administration Tool.
2. Choose User Settings › Users.

   Result: The Users page appears.
3. Click Add.

   Result: The User Information page appears.
4. Fill in the boxes with the user information, such as name, password, login ID, and language.

   Tip: Click the Help button for information about the contents of each field.
5. Click Save.

For more information

The online Help explains how to add, change, and delete users.

Associating lines, machines, and default users

When to use

This section explains how to link a telephone line to a specific computer and assign a default user. Before you can link the telephone lines and the computers, you must instruct the software to detect the lines and computers.

To associate lines, machines, and default users

1. Log on to the Symposium Agent Administration Tool.
2. Choose Machine and Line Associations node › Domain Computers.

   Result: The Domain Computers page appears.
3. Click Detect.

   Result: All of the computers appear in the list.

   Note: You can manually add the names of any computer that do not appear on the list.
4. Choose Machine and Line Associations node › Line Devices.

   Result: The Line Devices page appears.
5. Click Detect.

   Result: After a few seconds, the list of lines appears.
6. Choose Machine and Line Associations node › Associations.

   Result: The Machine and Line Associations page appears.
7. Click Add.
8. From the top list box, select the computer name that you want to associate.
9. From the middle list box, select the TAPI line that you want to associate with the computer that you selected in the previous step.
10. In the bottom list box, select a default user whose name is associated with this machine/line combination.
11. Click Add.

For more information

The online Help explains how to add, change, and delete lines, machines, and associations.

Creating call rules

When to use

Call rules enable telephony information to pass to Windows applications and Symposium Agent tabs.

The Symposium Agent Call Rules Explorer provides wizards that guide you through the creation of the elements that make up a call rule. Once you have created each of the elements, use the Call Rule wizard as a type of master list to assemble the elements into a complete call rule.

Order of procedures

You must complete the following tasks *in order* before you run the Call Rule wizard. Step-by-step instructions for these tasks and a tutorial appear in the online Help that is part of the Symposium Agent Administration Tool:

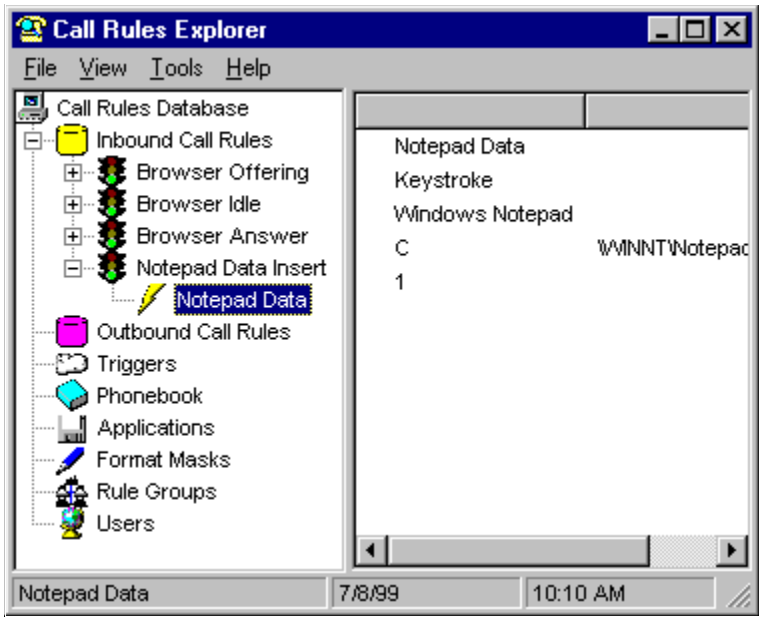
1. Add an application.
2. Create a format mask.
3. Create a trigger.
4. Test the trigger.
5. Add numbers to the phone book.
6. Run the Call Rule wizard.

To open the Call Rules Explorer

1 Log on to the Symposium Agent Administration Tool.

2 Choose Call Rules › Call Rules Explorer.

3 Click the Call Rules Explorer icon.



4 Click Help from the Symposium Agent Administration Tool's menu bar and refer to the online Help for complete instructions on creating call rules and rule groups.

Using the online Help

When to use

The Symposium Agent Administration tool includes extensive online Help in HTML format for administering the system after the installation and initial setup. The Help topics, reference information, and brief tutorials appear in a Table of Contents that you can open using your browser. The Help topics are also indexed by keywords.

Before using the online Help, you may need to relax your browser security for the intranet (not Internet) zone to allow the use of the ActiveX control that provides the Help Table of Contents. For instructions on browser security settings, see“Running the Symposium Agent Administration Tool” on page 68 or refer to the *Programming Guide*.

To open the online Help

1. From the browser-based Symposium Agent Administration Tool, choose Help › Help Topics.
2. If you receive a warning about using an ActiveX control, then customize your Internet Explorer browser’s security settings as explained in “Running the Symposium Agent Administration Tool” on page 68.
3. Expand the Table of Contents nodes to view the Help or search in the index.
4. For context-sensitive Help from within a page of the Symposium Agent Administration Tool, click the Help button on the page.

Notes:

1. For easier printing of the online Help contents, double-click the SA Help icon on the server’s desktop. By default, the compiled HTML Help file is installed in c:\Nortel\Server\DialPlan\Sa.chm. In the same location, you will find a copy of HHUPD.EXE that you can run to update the Help ActiveX control.
2. For future reference, a copy of this *Installation Guide* is installed by default on the server in c:\Nortel\Server\sa2install.pdf.

The Help tab of the online Help points to extra HTML pages that you can customize to include local procedures.

To customize the online Help

1. On the Symposium Agent server machine, locate the HTML files called clink1.htm, clink2.htm, and clink3.htm. By default, these files are installed in c:\Nortel\Server\SAAdmin\Help\.
2. Edit the files and add your own content using an HTML editor such as Microsoft FrontPage.
3. To check your content, click the Help tab from within the online Help window.

Database maintenance procedures

Scheduling a purge or backup of the sar2 database

In order to set up schedules correctly, Win NT Schedule service should be running.

To start the Windows NT Schedule service

1. On the Windows Start menu, chose Settings › Control Panel › Services.
2. Select the Schedule Service and click Start.

To purge or backup the sar2 database

1. From the SA Administration web pages navigate to the Database Maintenance page.
2. Click Server.
3. Click Database Maintenance.
4. Click Purge or Dump.
5. You can set up a day and time to purge or backup the sar2 database. The time is based on the 24 hour clock. For example, if you select 9:40 as the time and set Tuesday as the day and click the save button a new schedule will been made. The database will automatically purge or backup the sar2 database at 9:40AM on each Tuesday. You can schedule as many jobs as needed. Select a new time and day and click the Save button.
6. If you want to cancel all the schedules you have made, click the Delete button. All the schedules you have made will be deleted. You will need to make up new schedules to dump or purge the database.

To use the database maintenance tool through NNDBCFG.exe

1. On the Server, click SA Server Configuration.
2. Click Database Administration.
3. Select Database Maintenance.
4. Click OK button.

5 Check Purge, Dump, or Load, and then click OK.

Purging the Database

Before you purge the database, you should go to the web page to set up the maximum retain days. Go to the web page, click the General setting and set up maximum retain days for your call logs and session records. The default days are three.

After the maximum retain days is set up, you can purge the database. When purging the database is over, the entire call log and session records except those stored in the database in the recent days, which you set up by web page, will be remove from the database.

Restoring the Database

In order to restore the database from backups, make sure that the database is not in use. If the database is in use, you will not be able to restore the database from the backups.

Restoring the database when the SA server is rebuilt

The following steps document the procedure for restoring the Symposium Agent database in the case where the server must be rebuilt.

The following files should be periodically saved:

- the master dump device
- the temp device
- the dump device
- the database device
- the transaction log device
- the createdatabase.out file
- the configsrv.out file

These files were created during the initial configuration of your database. If you do not recall the names of these files you can use the following command to obtain this information. From a MS-Dos prompt type the following commands:

isql -Usa -P -S<SERVERNAME>

At the isql prompt type:

1>sp_helpdevice

2>go

You will see information about the files above including their location.

Rebuild an SA server following the instructions in the sections on installing the server software and configuring the server - section A: New Installation. Install the same version of SA Server software that was on the original server. Install the same version of Sybase software that was on the original server. Make sure to install everything into the same folders as the previous install and use the same configuration as the original server. During the SA database creation and configuration step use the same names for the devices above and also use the same server configuration parameters as defined in the output files.

Then copy over the backed up files on to the new server into the correct locations. The database will be restored.

Take a look at the Web pages to verify that the database has been restored.

Chapter 5

Installing the client software

In this chapter

Installing the client software 88
Running the client software 90

Installing the client software

When to use

After you have configured the Symposium Agent server, install and configure the client software on each agent workstation. This software is available on the Symposium Agent server in the shared folder called \\ServerName\Launcher.

To install the client software

1. Install Microsoft Internet Explorer 4 Service Pack 1 or higher. Follow the installation instructions included with the program.
2. Install the Microsoft Data Access Components version 2.1.
3. If you are installing on a Windows 95 system, install the Microsoft Remote TAPI service provider version 2.1. For more information see, “To configure the Remote TAPI service provider” on page 88.

   Do not install TAPI Client 2.1 on Windows NT. The TAPI software is installed by default on Windows NT with Service Pack 4 installed.
4. Install the Symposium Agent Launcher. For instructions, see “To install the Symposium Agent launcher” on page 89.

To configure the Remote TAPI service provider

1. Log on to the agent workstation. If the workstation is running a version of Windows NT, then make sure that you are logged on with administrator privileges.
2. Choose Start › Run.
3. Type **tcmsetup /c <tapiservername>**, where <tapiservername> is the name or IP address of the TAPI service provider.
4. Click OK.

   Result: A message box confirms the TAPI client setup.
5. Click OK to close the message box.

To install the Symposium Agent launcher

1. If you have not already done so, log on to the agent workstation. If the workstation is running a version of Windows NT or Windows 2000, then make sure that you are logged on using the local Administrator user ID.
2. In the Launcher directory, double-click Setup.exe.

   Note: Because you are installing the software over a LAN, Setup may run more slowly than usual.

   Result: The Welcome window appears.
3. Click Next.

   Result: The Choose Destination Location window appears.
4. Confirm the location of the Symposium Agent client files, and then click Next.

   Result: Setup begins copying the program files. If you encounter messages about read-only files, then click Yes each time to overwrite the read-only file.
5. On the Setup Complete screen, select the option to restart the computer, and then click Finish.

Running the client software

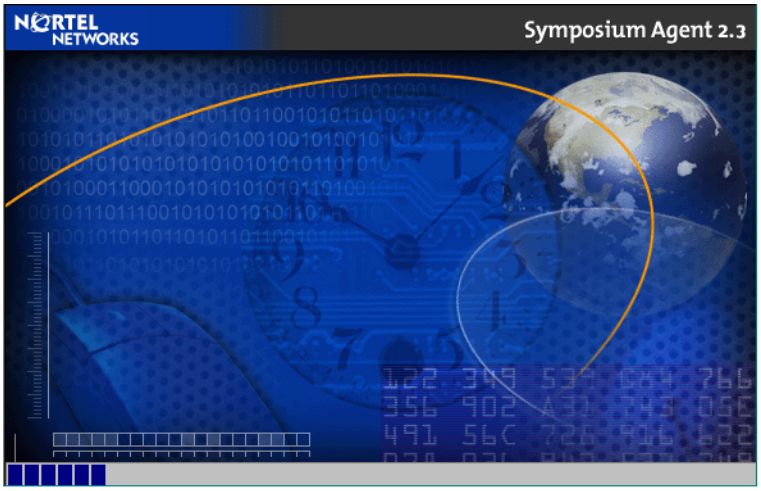
When to use

Follow the instructions in this section to run and log on to the Symposium Agent client.

To run the Symposium Agent client

1. If you have not already done so, log on to the agent workstation. If the workstation is running Windows NT or Windows 2000, then make sure that you have local Administrator privileges. For Windows 2000 and Windows NT, if you have already downloaded the client files, then you can login as a non-administrative User and run the nnlogin.exe program to startup the client.
2. From the Start menu, choose Programs › Nortel › Symposium Agent 2.3 Client › Symposium Agent 2 Client.

   Result: The first time that the agent client runs, it downloads a complete set of files. On subsequent uses, the client checks for new or updated versions of files and only downloads those that are required.



3 When the Login dialog box appears, enter a user ID and password to log on.

For information about configuring user IDs, see “Adding agents and other users” on page 77.

Where to find more information

Consult the online Help (part of the Symposium Agent Administration Tool) for information on using the agent client program. The instructions are under the Using Agent on the Desktop heading.

For more information about online Help, refer to “Using the online Help” on page 82.

Chapter 6

Uninstalling the software

In this chapter

Uninstalling Symposium Agent from the server 94
Uninstalling Symposium Agent from the client 100

Uninstalling Symposium Agent from the server

When to use

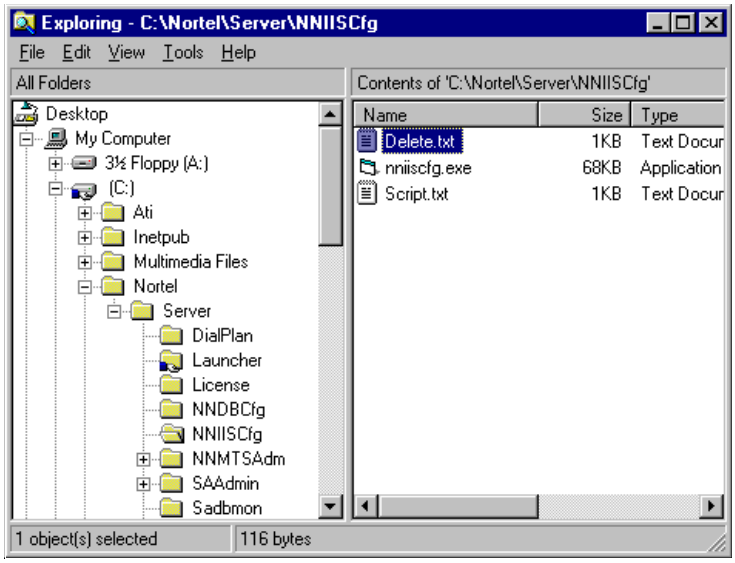
Follow the procedures in this section to remove the Symposium Agent software from the server computer.

Before you remove the Symposium Agent software components, you must remove the virtual directories from Internet Information Server.

To remove Symposium Agent virtual directories from Internet Information Server

1 Open Windows Explorer and navigate to the NNIISCfg directory. By default, the path is c:\Nortel\Server\NNIISCfg\.

2 Locate the text file Delete.txt in the NNIISCfg directory.



3 Drag Delete.txt and drop it onto the program file nniiscfg.exe.

Result: Although there is no immediate visual indication, this step removes the virtual directories from Internet Information Server.

4 For Windows NT: From the Windows Start menu, choose Programs › Windows NT 4.0 Option Pack › Microsoft Internet Information Server › Internet Service Manager.
For Windows 2000: From the Windows Start menu, choose Programs › Administrative Tools › Internet Service Manager.

5 Confirm the removal of the virtual directories:

   a. For Windows NT only: Expand the Default FTP Site node to confirm that the virtual directory saswdist has been removed.

   b. Expand the Default Web Site node to check that the virtual directories SAAdmin and SAWebApp have been removed.

To remove Symposium Agent server components

1 From the Windows Start menu, choose Settings › Control Panel › Add/Remove Programs.

2 Select Symposium Agent 2.3 Server.

3 Click Add/Remove.

4 Click Yes to confirm that you want to remove Symposium Agent Server.

5 If you are prompted to remove shared files, then click Yes.

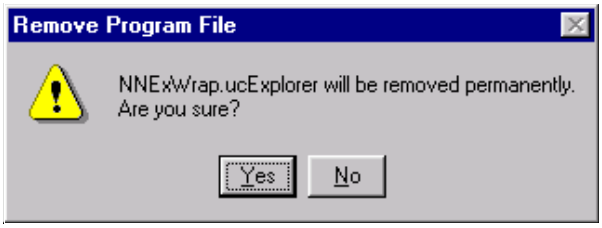
6 If you are prompted to remove locked files, click Yes to have them removed after reboot.

To remove the Symposium Agent Call Rules Explorer from the server

1 Close all of the instances of Internet Explorer.

2 In Windows NT Explorer, navigate to c:\Winnt\Downloaded Program Files.

3 Right-click NNExWrap.ucExplorer and select Remove.



4 Click Yes to confirm the file deletion.

Note: Log files (*.log) and the database output files (*.out) that were created after the initial installation may not be removed. Any files left under c:\nortel\server can be safely deleted manually after the uninstall is finished.

To remove the Microsoft Transaction Server packages or COM+ applications from the server

1 For Windows NT: From the Windows Start menu, choose Programs › Windows NT 4.0 Option Pack › Microsoft Internet Information Server › Internet Service Manager.
For Windows 2000: From the Windows Start menu, choose Programs › Administrative Tools› Component Services.

2 For Windows NT: From the left side, double-click Microsoft Transaction Server.
For Windows 2000: Double click Component Services.

3 Double-click Computers.

4 Double-click My Computer.

5 For Windows NT: Double-click Packages Installed.
For Windows 2000: Double click on COM+ Applications.

6 From the right side, right-click the SAAdmin package and select Delete.

7 Click Yes to confirm the deletion.

8 Right-click the Symposium Agent package and select Delete.

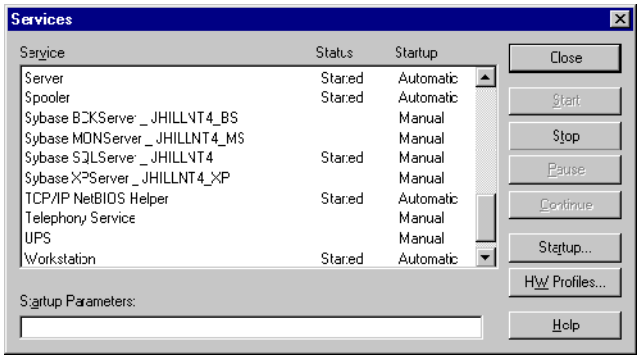
9 Click Yes to confirm the deletion.

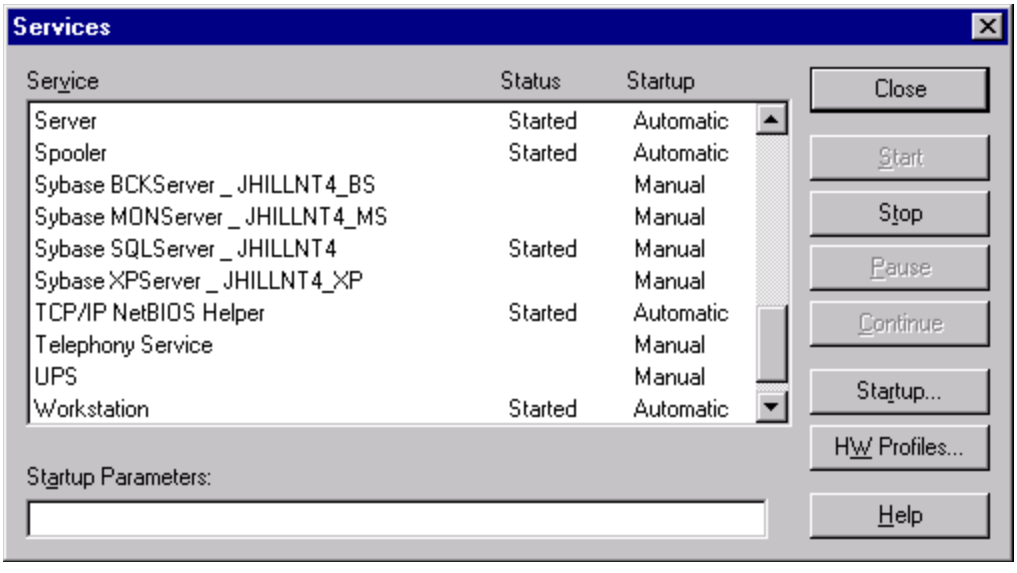
10 Select Console › Exit to close Internet Services Manager

To uninstall Sybase Adaptive Server

Sybase 12.0 does not have an uninstall program, and must be removed from the system manually.

1 Shutdown Adaptive Server. From the Control Panel -> Services





a. Select the sybase services and "stop" them. Also set their Startup configuration to "manual".

2 Shutdown, then restart the Windows Server. This releases the DLLs in memory.

3 From the Windows task bar, select Start -> Run, then enter **regedt32** to start the Registry editor.

4 Go to HKEY_LOCAL_MACHINE\SOFTWARE\Sybase\Server.

5 In the \Server key, delete the following keys related to the Sybase Adaptive Server:

- \\HKEY_LOCAL_MACHINE\SOFTWARE\Sybase\Server\<server_name>
- \\HKEY_LOCAL_MACHINE\SOFTWARE\Sybase\Server\<server_name>_BS
- \\HKEY_LOCAL_MACHINE\SOFTWARE\Sybase\Server\<server_name>_MS

6 For the following Registry key: \\HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Control\Session Manager\Environment make these changes:

- Delete the settings for the Sybase variables DSLISTEN, DSQUERY, and SYBASE, and any other Sybase-specific environment variables.
- Remove all references to the Sybase installation directories in the PATH.

7 In the following Registry key:

8 \\HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services remove these references:

- SYSBSQL_<server name>
- SYBXPS_<server name>
- SYBBCK_<server name>
- SYBMON_<server name>

9 Restart your computer to update the changes made to the Registry.

10 Note: If you get an Event Viewer warning upon restarting the computer, you may not have cleaned-up all of the Sybase services. See the Event Viewer Application log for details.

11 Use the Control Panel -> Services to verify that the Adaptive Server services have been removed. If not, check the Registry for the above keys

in ControlSet001, ControlSet002, and ControlSet003. Make sure you have deleted the specified entries from each of the keys in the Registry.

12 You can now delete all of the files under the Sybase installation directory, for example "C:\Sybase"

Uninstalling Symposium Agent from the client

When to use

You can remove the Symposium Agent software from the client (agent) workstations using the following procedure.

To remove the Symposium Agent client

1. From the Windows Start menu, choose Settings › Control Panel › Add/ Remove Programs.
2. Select Nnlogin, and then click Add/Remove.
3. When you are prompted, click Yes to confirm the deletion of Nortel Networks specific files.
4. In the Add/Remove Programs window, click Remote Application - Symposium Agent (remove only), and then click Add/Remove.

   Note: On Windows 2000 this item will read Symposium Agent (Application Proxy).
5. Click Yes to confirm the deletion.
6. In the Add/Remove Programs window, click Symposium Agent 2.3 Client and then click Add/Remove.
7. Click Yes to confirm the deletion.
8. If you are prompted to remove shared files, then click Yes.

   Log files (*.log) that were created after the installation cannot be removed. Any files left under c:\progam files\nortel\nnlogin or c:\program files\nortel \SA client can be safely deleted manually after the uninstall is finished.

Appendix A

Other features

In this appendix

Changing the Sybase port 102

Using the Windows NT Schedule service to update clients. 106

Changing the Sybase port

When to use

If TAPI Service Provider 2.1 is installed on the same server as Symposium Agent, then you will have a port conflict.

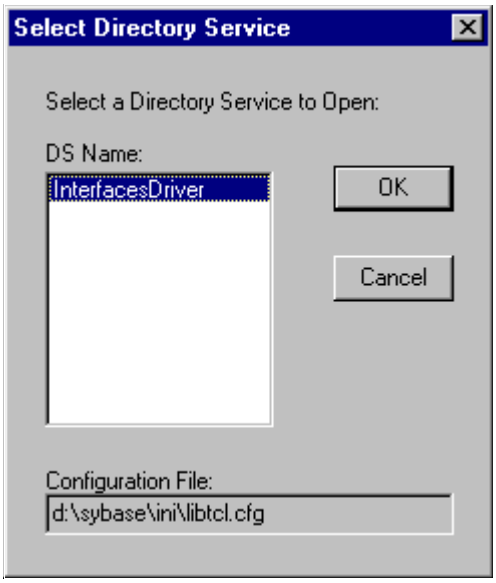
When you install Sybase, it defaults to port 5001, which may conflict with IVR versions of the TAPI Service Provider that also use port 5001. After you install Sybase, follow the procedure in this section to change the port that Sybase uses.

Note: You can skip this section if you do not have a conflict on port 5001.

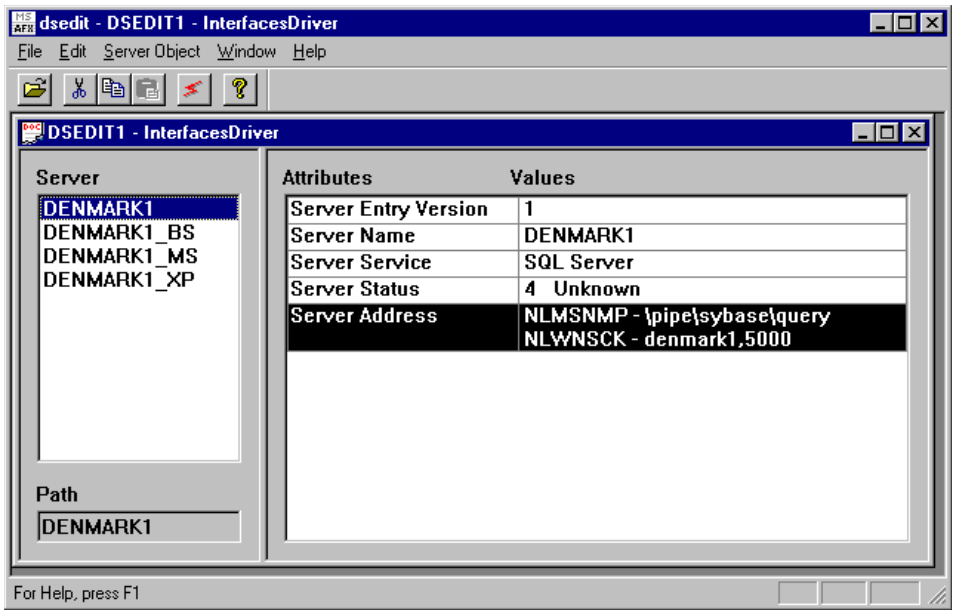
To change the port that Sybase uses

1. From the Windows Start menu, choose Settings › Control Panel › Services, ensure that all of the Sybase services are stopped, and then close the Services window.
2. On the server that is running Sybase, run choose Start › Programs › Sybase › Dsedit.exe.

Result: The Select Directory Service window appears.



3 Select the Directory Service Name, and then click OK.

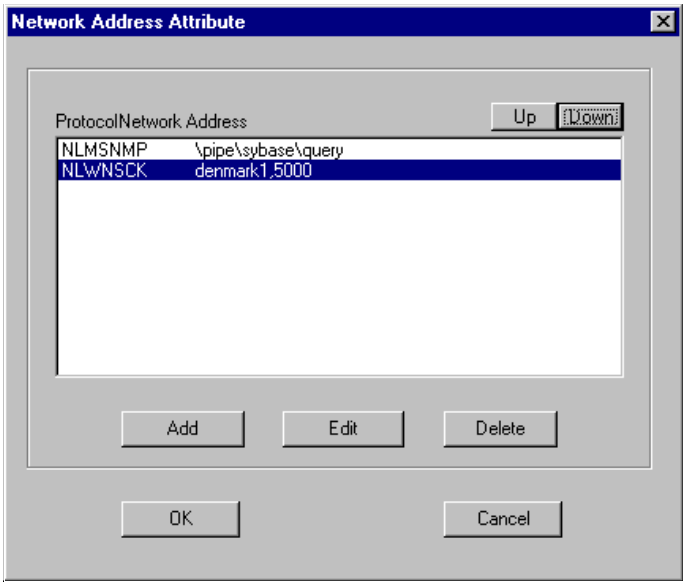


4 In the Server pane, select the name of the Sybase server (for example, DENMARK1).

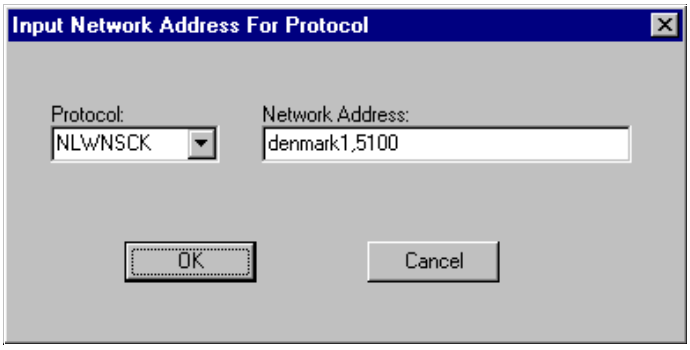
5 In the Attributes pane, select Server Address.

6 Choose Server Object › Modify Attribute.

Result: The Network Address Attribute window opens.



7 Select NLWNSCK, and then click Edit.



8 Change the port number for the Sybase server from the default value (5000) to a port value that does not conflict with your other components (for example, 5100).

If the new value conflicts with other components, then increase the port number by 100 and try again until there is no conflict.

9 Choose Settings › Control Panel › Services, and restart Sybase Adaptive Server.

10 Use the Sybase Ping utility to verify that the new port is working.

To locate the Sybase Ping utility:

a. Choose Start › Programs › Sybase › Dsedit.

Result: The Select Directory Service dialog appears.

b. Click OK.

c. Choose Server Object › Ping Server.

Result: The Ping dialog box appears.

d. Select Ping.

e. Select Done.

f. Choose File › Exit.

11 Click OK twice to close the dialog boxes, and then exit the Dsedit utility.

Using the Windows NT Schedule service to update clients.

When to use

The NT schedule service can be used to run the Launcher program unattended. The Launcher can be run as a background process to install or update Symposium Agent client files. This allows the client machine to be logged in as a regular domain user (with no administrative privileges). If you are not familiar with the NT Schedule Service, or the AT command, consult the online help included with the Windows NT and Windows 2000 Operating systems.

Glossary

A

ACD
See Automatic call distribution.

administrator
A user who is responsible for the setup and ongoing maintenance of the Symposium Agent.

agent
A person who is responsible for handling customer transactions.

agent login ID
A unique identification number assigned to a particular agent. The agent uses this number when logging in.

API
See application program interface.

application program interface
A set of routines, protocols, and tools that programmers use to develop software applications. APIs simplify the development process by providing commonly used programming procedures.

Automatic call distribution
A means of automatically distributing an organization's incoming calls among a number of answering positions (ACD agents). Automatic call distribution is useful in operations where callers want a service rather than a specific person. Calls are serviced in the order they arrive and are distributed so that the workload at each answering position is approximately equal.

B

blended call center
A call center which uses telephony, web traffic, or other media to handle incoming customer requests.

C

Calling Line Identification
An optional service that identifies the telephone number of the caller. This information can then be used to route the call to the appropriate agent or skillset. The caller's telephone number can also be displayed on a phoneset.

CDN
See controlled directory number.

CLAN
See Customer local area network.

CLID
See Calling Line Identification.

client
The part of a client/server architecture that runs on a personal computer or workstation and relies on a server to perform some operations. For example, an e-mail client is an application that enables you to send and receive e-mail.

computer telephony integration
The use of computer technology to enhance the telephony switch capability.

controlled directory number
A special directory number that allows incoming calls to be queued at a CDN when they arrive at the switch. Messages regarding these calls are sent to the Symposium Agent.

CTI
See computer telephony integration.

Customer local area network
The LAN to which your corporate services and resources connect. The Symposium Agent and client both connect to the CLAN. Third-party applications that interface with the server also connect to this LAN.

D

DBMS
Database Management System

Dialed Number Identification Service
An optional service that allows the system to identify the phone number dialed by the incoming caller. Agents can receive calls from customers calling in on different DNISs, and tailor their responses according to the DNIS.

directory number
The number that identifies a phoneset on a switch. The directory number (DN) could be a local extension (local DN), a public network telephone number, or an automatic call distribution directory number (ACD-DN).

DMS-100
Digital Multiplex Switch

DN
See directory number.

DNIS
See Dialed Number Identification Service.

dongle
A hardware device used to verify ownership of Nortel Networks software applications.

E

ELAN
See embedded local area network.

embedded local area network
A dedicated Ethernet TCP/IP LAN connecting the Symposium Call Center Server and the switch.

Ethernet
A widely used LAN protocol that uses a bus topology and supports data transfer rates of 10 Mbps.

I

IIS
See Internet Information Server.

Internet Information Server
The Microsoft web server that allows you to publish and host HTML pages, active server pages, and and other applications.

IP address
Internet Protocol address. An identifier for a computer or device on a TCP/IP network. Networks use the TCP/IP protocol to route messages based on the IP address of the destination. The format of an IP address is a 32-bit numeric address written as four numbers separated by periods. Each number can be zero to 255. For example, 1.160.10.240 could be an IP address.

L

LAN
See Local area network.

Local area network
A computer network that spans a relatively small area. Most LANs connect workstations and personal computers and are confined to a single building or group of buildings.

M

M1
Meridian 1 switch

O

object linking and embedding
A compound document standard that enables you to create objects with one application and then link or embed them in a second application.

ODBC
See Open Database Connectivity.

OLE
See object linking and embedding.

Open Database Connectivity
A Microsoft-defined database application program interface (API) standard.

P

PC
Personal computer. A computer with an architecture that is compatible with the IBM PC.

personal directory number
A DN on which an agent can be reached directly, usually for private calls.

phoneset
The physical device, connected to the switch, to which calls are presented. Each agent and supervisor must have a phoneset.

priority
An attribute of a skillset assignment that determines the order in which calls from different skillsets will be presented to an agent. When an agent becomes available, calls may be waiting for several of the skillsets to which the agent belongs. The server presents the call queued for the skillset for which the agent has the highest priority.

protocol
A standard format used for communication between two devices. The protocol determines the type of error checking to be used, the data compression method (if any), how the sending device will indicate that it has finished sending a message, and how the receiving device will indicate that it has received a message.

S

SCM
See Service Control Manager.

screen pop
An application launched on an agent's computer screen when information is received from a host application.

server
A computer or device on a network that manages network resources. Examples of servers include file servers, print servers, network servers, and database servers.

service
A process that adheres to a Windows NT structure and requirements. A service provides system functionality.

Service Control Manager
A Windows NT process that manages the different services on the PC.

service-level
The percentage of incomings calls answered within a specified number of seconds.

skillset
A group of capabilities or knowledge required to answer a specific type of call.

supervisor
A user who manages a group of agents.

switch
The hardware that receives phone calls and provides connections to phonesets.

SWRS
Symposium Agent

T

TAPI
See Telephony Application Programming Interface.

TCP/IP
Transport Control Protocol/Internet Protocol. The communication protocol used to connect devices on the Internet. TCP/IP is the standard for transmitting data over networks.

telephony
The science of translating sound into electrical signals, transmitting them, and then converting them back to sound. The term is used frequently to refer to computer hardware and software that perform functions traditionally performed by telephone equipment.

Telephony Application Programming Interface
An industry-standard API interface for performing telephony operations, defined by Microsoft.

threshold
A value for a statistic at which system handling of the statistic changes.

Token Ring
A PC network protocol developed by IBM. A Token Ring network is a type of computer network in which all the computers are arranged schematically in a circle.

W

WAN
Wide area network. A computer network that spans a relatively large geographical area. Typically, a WAN consists of two or more local area networks (LANs). The largest WAN in existence is the Internet.

web browser
Software, such as Internet Explorer, used to display HTML pages.

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Nortel Networks Symposium Agent Release 2.3
Installation Guide

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5. What information (if any) was missing from this book?

   _____

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6. How could we improve this book?

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NORTEL NETWORKS™

Reader Response Form

Reader Response Form

Nortel Networks Symposium Agent
Installation Guide

Toronto Information Products
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